

# LOW INCOME HOME ENERGY ASSISTANCE PROGRAM

## DATA ENTRY MANUAL PY 06



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## Energy Assistance Priorities

1. **Read the state manuals carefully.** This manual is for the data entry portion of LIHEAP only; you will need to become extremely familiar with all of the rules and regulations for each program.
2. **Perform accurate data entry of applications promptly and efficiently** throughout the season. Under our contract with the Idaho Department of Health & Welfare, we have a period of 30 days from the application date to receive, process, and perform data entry on applications. Those 30 days can seem like a long time, but it goes by very quickly. You should aim to have applications received, processed, and data-entered within about a week of the application date. That gives you plenty of time to correct any errors or other issues that may come up with an application.
3. **Notify vendors and clients** of any changes in the amount of energy assistance benefits within 30 days of the application date. You should do vendor faxes and write client letters at least twice a week. It is very important that we keep our vendors notified if there are any changes in the amounts of benefits that we have reported.
4. **Keep an accurate running total** of checked-in applications throughout the season. This allows your supervisors to follow trends and schedule energy assistance appointments if necessary. .
5. **Stay organized!** You never know when you might need to find a particular bit of information or an application on a moment's notice. You will be receiving calls from vendors, clients, the Dept. of Health & Welfare, and agency representatives needing information on clients, and it's easiest if you know where every application is at all times, or at least where to begin looking.

## Data Entry Responsibilities

### 01. Checking In Received Applications

- A. **This needs to be done on a daily basis.** You will be receiving Microsoft Excel files as a printed hard copy from agency reps in CAP and satellite offices. These are called Application Batch Cover Sheets, they should have a unique name & number, in the following format:

**X-000-YYYYMMDD**

**X** stands for the first letter of the office name that the batch is sent from.

**000** The CAA application batch sheet number will contain a three digit number assigned by the office between **000** and **999**. These will be in order numerically so that you can notice immediately if you don't receive a batch of applications.

YYYYMMDD is the date of the batch sheet. For example, a batch sheet from December 12<sup>th</sup>, 2003 will have **20051212** here.

- B. Carefully examine the printed application batch cover sheet that comes from the agency rep (or satellite office) with the batch of applications and check off the applications on the batch sheet, making sure that you have received all of the applications you were supposed to receive in that batch. If you are missing an application, notify the office involved immediately.
- C. As you check off the applications on the batch sheet, stamp each application with a **RECEIVED \*DATE\*** stamp and make a mark under the appropriate box on a **“Received Files Tally Worksheet.”** ***At this time, you should also be separating the applications by Emergency and Date to save time.*** When you’ve checked in all of the applications for that day, total up the **Received Files Tally Worksheet** and enter the data from the worksheet into the **Tally Data** spreadsheet. File the **Application Batch Sheets** in a folder in your filing cabinet, and file the **Received Files Tally Worksheet** in another folder in your filing cabinet. Place the stamped applications in a basket for prioritization.
- D. The **Tally Data** spreadsheet will automatically calculate the totals of emergency and regular applications for each county as you go. There are several other worksheets within the **Tally Data** spreadsheet that will allow you to generate reports for your supervisor.

## 02. Prioritizing Applications

After applications have been checked in, they need to be prioritized so that they are processed fairly. Sort the applications as follows:

1. First, **sort into piles by date**. Energy Assistance is ‘first come, first served.’
2. After the applications are sorted into piles by date, **sort each pile by application type** in this order:
  - a. **Emergency Bulk Fuel Applications** – Applications with wood, pellets, oil, or propane as the primary heating fuel are marked as *emergency* with a green marker. These are applications in which the client is almost out of fuel. We process these applications first because the vendor will deliver fuel immediately after we approve the application, but we need to know for certain that the client’s application is correct. If there is a change in the amount of the benefit, the vendor must be notified immediately. It is very expensive for the vendor to go back to the client to deliver more fuel or repossess fuel, if the benefit amounts change. Theoretically, we want to notify the vendor of a benefit change before the vendor delivers the fuel, especially wood and oil vendors.

- b. **Regular Bulk Fuel & Direct to Client Applications** – Applications with wood, pellets, oil or propane as the primary heating fuel  
**Or** direct to client applications, in which a check is sent directly to the client (for example, applications with wood as a primary heat source but *without a vendor* **or** heat-in-rent applications).
- c. **Emergency Utility Applications** – Applications with electric or natural gas utilities are marked as emergency with a green marker. Emergency utility applications are applications where the client has a shut-off notice or has already been shut off.
- d. **Regular Utility Applications** – Applications with electric or natural gas utilities as the vendor.

### 03. Processing Applications

Check over each application thoroughly to be certain that the application is correct and prepare the applications for batching and data entry. See **APPENDIX C: Checking Applications** for an overview of the following section.

#### CHECK FOR TARGETS

1. **60 by 9/30.** Look through the birthdates of all household (hereafter abbreviated as HH) members for any members who will be 60 by next September 30th (i.e., the applicant must have turned 59 before last September 30th). If there are any HH members who will be 60 before next September 30th, write a “1” in the bottom left margin on the front page of the application.
2. **Disabled.** Look for any HH members that have been indicated as ‘disabled.’ If there are any, write a “2” in the bottom left margin on the front page of the application.
3. **Migrant Worker.** Look for any HH members for whom *Farm Worker* has been coded as “1” or “Migrant.” If there are any, write a “3” in the bottom left margin on the front page of the application.
4. **Child Under 6 by Date of Application.** Look through the birthdates of all HH members in the application for any who will be under the age of six by the application date. If there are any, write a “4” in the bottom left margin on the front page of the application.
5. **Native American<sup>1</sup>.** Look through all household members who have race coded as “3” or “Native American” or “Indian.” If there are any, write a “5” in the bottom left margin on the front page of the application.
6. **No Targets.** If none of the above applies, write a “6” in the bottom left margin on the front page of the application.

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<sup>1</sup> Note: Native American is not truly a target but is a demographic indicator. If there is only one person in the household and they are Native American, they \$25 is not added to their benefit.

## CHECK FOR ASSISTS

1. **Food Stamps.** Check all HH members to see if any are receiving food stamps. If there are any, write a “1” in the bottom right margin on the front page of the application.
2. **SSI / Supplemental Security.** Check all HH members to see if any are receiving SSI or Supplemental Security (check the income declaration page). If any, write a “2” in the bottom right margin on the front page of the application.
3. **Social Security.** Check all HH members to see if any are receiving Social Security (check the income declaration page). If any, write a “3” in the bottom right margin on the front page of the application.
4. **TAFI.** Check all HH members to see if any are receiving TAFI (check the income declaration page). If any, write a “4” in the bottom right margin on the front page of the application.
5. **No Assists.** If there are no assists, write a “5” in the bottom right margin on the front page of the application.

## CHECK FOR SIGNATURES

1. The **Income Declaration Page** *must be signed and dated* by both the Participant (Client) and the Agency Representative. If both signatures and the application date are there, make a check mark to the right of the signatures.
2. The **Privacy Act and Information Release Page** *must be signed and dated* by both the Participant and the Agency Representative. **Vendor Utility and Billing Account Number** should also be completed. If this has been done, make a check mark to the right of the signatures.
3. Any **Self-Declaration of Income Pages** *must be signed and dated* by both the Participant and the Agency Representative.

## CHECK FOR OUTREACH

Check to see if the agency representative has indicated “Outreach” or “Home Visit” on the application, and check which information or verification the agency rep. has seen. This can count as complete verification, if the agency representative indicates that they have seen all necessary verification.

## CHECK FOR LANDLORD INFORMATION

If the applicant is renting, check to make sure that the landlord information is filled out.

## VERIFY ALL SOCIAL SECURITY NUMBERS

1. Look through the application for correct verification of every social security number. Please make a checkmark next to the verification (i.e., copied SS card, pay stub, initialed note by intake worker in Comments section of application, etc.) and then also make a checkmark next to the social security number as listed on the actual application. This indicates that you have seen the verification and that you have double-checked the number.
2. When SS verification is not available the Agency Rep should assign the HH member a C0 number. Check to see that all members have either a verified SS number or a C0 number.
3. If SS verification is missing, check EPICS first for the client for that SS number before calling the Agency Rep.
4. The **SSN** and/or the **CO#** are very important as the Applicant's number is the "CASE NUMBER" and it will follow them through the entire heating season. If you have an incorrect #, this can cause delays in payment not only for the client, but for someone else's application that had the correct information. This will cause the application to duplicate out on the next pay date.
5. **YOU MUST DOUBLE CHECK THE SSN FOR ACCURACY WHEN CHECKING THE APPLICATION AND DOING DATA ENTRY.**

## CHECK ALL BIRTHDATES FOR HOUSEHOLD MEMBERS

You don't need to have verification in the application for the birthdates, but make sure that they are all there. The Statewide Database uses normal form for the date. You must turn them around when doing data entry into the H & W database. Example: 20051212

## VERIFY RESIDENCE/ MAILING ADDRESS

Proof of address can be anything that has the client's address on it, usually a utility bill. Check the address verification carefully to ensure that it has been written (or typed in) correctly on the first page of the application. Make sure that apartment or space numbers are indicated as well. Some of the acceptable forms of proof are power bills, income tax return, and form of bill or letter that shows their current residence address. If they use a PO Box for mailing, we do not have to have proof of the PO Box, however, we must have proof of where the residence is.

Please use a standardized form when data entering the addresses. For example, use ST for Street, AVE for Avenue.

## VERIFY NUMBER IN HOUSEHOLD

Check that the number in the household is the same as the actual number of household members listed on the application. If there are any discrepancies, check with the Agency Rep. If this number is incorrect, the application will be kicked out into an **Error Batch** (see **Correcting Error Batches**) and you will have to fix it later if it is missed prior to data entering.

## VERIFY VENDOR ACCOUNT NUMBERS

1. If the application indicates a vendor, check for verification in the file of the vendor and the vendor account number listed on the front page of the application. **Check the account number carefully, and then check it again.**
2. If the application has a primary heating type of **wood**, and there is no vendor OR if the application is **heat in rent**, (i.e., the benefit is being paid directly to the client), it's a good idea to check for verification of the mailing address so that the check is ensured of going to the correct place.

## VERIFY INCOME AMOUNT

1. Add up all of the income verification in the file; see if you come up with the same figures as the Agency Rep. Look at pay stub dates and amounts carefully. Make certain that all income is accounted for.
2. Check the final 3-Month Total Gross Income figure against the LIHEAP POVERTY GUIDELINES chart you will be given to make sure that the household is not over income.
3. Income can be the most difficult area to verify. Read pages 28 – 38 in the Idaho LIHEAP Program Manual thoroughly for all issues regarding income.

## CHECK THE MATH

1. **Matrix.** If the Agency Rep has used the Matrix Cost for the application, check first of all to make certain that they are using the correct matrix for the heating type listed under **Primary Heat Type** and for the **County** listed on the front page of the application.
2. **Income.** The Agency Rep should have left the cents in when adding up various kinds of income until they arrive at a **3-month total gross income (TGI)**. Then, once all the income is added, the cents must be **dropped**. This is the only place in the entire application where the cents are dropped; every other place follows normal mathematical rounding rules. For example: A client receives \$531 a month for SSI, \$400 a month for child support, and \$124.63 monthly from employment. Her spouse receives \$381.28 monthly for employment:

Applicant SSI:	\$531 x 3	=	\$1593
Applicant Employment:	\$124.63 x 3	=	\$373.89
Spouse Employment:	\$381.28 x 3	=	<u>\$1143.84</u>



\$3110.73

**Final 3-Month Total Gross Income: \$3110**

So, even though the total of the **3-month TGI** for the household comes out to \$3110.73, the **Final 3-Month TGI** is still \$3110. The cents must be dropped before multiplying the **3-Month TGI** by 4 to get the **12-Month Total Gross Income**:

**Correct:**     **\$3110 x 4 = \$12440**  
**Incorrect:**   **\$3110.73 x 4 = \$12442.92**

3. **Burden.** The burden must be rounded from three decimal places to two (2) decimal places. **Idaho only considers the first three decimal places.** If the third decimal place is 5 or above, you round the second decimal place up; if the third decimal place is 4 or below, you leave the second decimal place as it is. For example, 0.04582 becomes 0.045 (not 0.046), and 0.45 becomes 0.05.
4. **Benefit.** The benefit is rounded normally: \$0.50 or above, you round up; \$0.49 or below, you round down. So a benefit of **\$307.78** would be rounded to **\$308**; and benefit of **\$256.42** would be rounded to **\$256**.

All of these figures must be rounded correctly to ensure a correct benefit. It pays to double-check the Agency Rep's calculations thoroughly so you only have to do it once. Otherwise, you'll find out later when the application is kicked out from the nightly process at H&W for you to correct then.

## FLAG BENEFIT CHANGES

If there are any changes in the amount of the benefit on an application, flag the application for a later benefit change fax to be sent to the vendor and a benefit change letter to be written to the client. The easiest way to do this is to put a sticky note on the top of the application like this:

<div style="border: 1px solid black; padding: 5px; margin: 0 auto; width: 80%;"> <b>BEN CHANGE</b>   + \$25.00 </div>			
WEATHERIZATION PARTICIPANT ASSESSMENT APPLICATION	BRIEF EXPLANATION	E BLOCK GRANT	<b>11290 03</b>

## DENYING AN APPLICATION

There are several reasons why an application might be denied. If you determine that an application should be denied, write the code number on the application under "Denial Code." This same code number is keyed under **DENIAL** when you enter the application.

1. **Household three month income exceeds the eligibility guidelines.** If the household's 3-Month Total Gross Income is higher than the eligibility guidelines chart that you will be given, write a "1" in the Denial Code section.
2. **Applicant is living in an ineligible institution.** If the application indicates 5 – 9 under the Housing Type question, the housing type is ineligible for assistance. Write a "2" in the Denial Code section.
3. **Applicant is living in subsidized housing and heat is included in the rent payment.** If both "rent subsidized" and "heat in rent" are coded as 1 or Yes, write a "3" in the Denial Code section.
4. **Applicant is not a legal U.S. Resident.** If the applicant indicates "4" under US Citizenship, write a "4" in the Denial Code section.

## INITIAL THE APPLICATION

When you have checked an application thoroughly, initial the bottom right-hand margin on the first page of the application. The outer sites should have someone in their office check the applications over before they are sent to you; its best if the application is checked at least twice.

## 04. Incomplete Applications

### Missing Verification

If an application is missing verification, **check EPICS first.** (Please see **Appendix D: EPICS Navigation** for more information on using EPICS.) If the client is receiving Social Security, SSI/Supplemental Security, TAFI, Food Stamps, or another federal program, they may be in the EPICS system. On EPICS you can often find verification for social security numbers, birthdates, residence & mailing addresses, Social Security income, SSI/Supplemental Security income, TAFI income, child support income (if it is distributed through the state), and even reported wages.

### Missing Signatures

If an application is missing the signature of the Agency Representative, get it right away. If it is from a satellite office, the intake worker can sign a copy of the needed page and send that signed copy to you in their next batch.

If an application is missing a client signature, call them up and have them come in if it is local. If the application is from a satellite office, the office in question can have the client sign a copy and send that signed copy to you in their next batch.

If you are unable to reach the client by phone, make a copy of the page that needs their signature and put that copy in the original application. Write a letter asking for their signature and enclose the original page from the application and a stamped envelope.

## Pending Files

You can put an incomplete application into **pending files**, but make sure that you check on the files at least twice a week. When an application is put into pending files, we have 10 days to get the necessary information. When the 10 days is up, make one last effort to get the information needed. If you have made every effort to contact the client to get the necessary information and are still unsuccessful, you may have to deny the application because of missing verification. There are denial letters available for you to use in the **EA Letters** folder. From time to time, you may receive applications that are missing verification.

## 05. The Batching Process

You will be entering applications into the Idaho Department of Health & Welfare's energy assistance database in batches. The batches you enter Monday through Thursday before 4:00 PM are processed nightly by the **Energy Assistance Program**. If the EA Program finds any errors in data entry on an application, it will kick the application out of the batch and place it into a special **Error Batch** for you to correct the following morning, then process the rest of the applications in the batch you entered. For more information, please see **Correcting Batch Errors**.

If the Energy Assistance Program finds that there are any social security numbers or addresses which are duplicated on another application that has been entered, it will add both applications to a **Duplicate Report** which you will receive Monday morning. These must be corrected by creating a new **Change Batch**. For more information, **please see Correcting Duplicates**.

Batches entered by 4:00 PM Thursday will go out in the paydate on Friday morning each week. Batches entered after 4:00 PM Thursday will not be processed until Monday night, and will not be paid until the following Friday.

The Department of Health & Welfare is required to mail checks out within two (2) business days after the paydate, so checks will be in the mail by Tuesday at the latest. However, it can take some time for a vendor to get a benefit amount credited to an applicant's account once they have received the warrant. AVISTA Utilities, for example, often takes as long as two weeks to apply a benefit to a client's account, even though they receive the actual funds in a lump sum via an electronic transfer. The client is told in the Energy Assistance application process that it may take as much as six weeks for their benefit to show up on their bill, IF they are approved.

**Direct Vendors** (those who have signed up with the State of Idaho) will receive a **warrant** that lists customers who are receiving benefits and the benefit amounts. The actual check from the Idaho Department of Health & Welfare may arrive with the warrant, a few days after the arrival of the warrant, or as an electronic transfer.

**2-Party Checks** are checks that have both the applicant and the vendor named as recipients. These are sent to the applicant's mailing address, so the applicant can sign the check and take it into the vendor to have them sign to receive the funds.

**Direct-to-Client** checks are benefits for assistance with WOOD in which no vendor is named OR benefits for applicants that pay their heating costs in their rent. These are sent to the applicant's mailing address and are payable directly to the applicant.

Each batch can contain as few as 1 and as many as 99 applications; however, it is easiest if you work in batches of 25. It is fine to have more or less applications in a batch, however, if necessary.

For more information, please see the **LIHEAP Program Manual**.

## 06. Getting a Batch Ready for Data Entry

Getting a batch ready for data entry involves these steps:

1. When you have 25 applications processed, gather them together into a pile.
2. Alphabetize the 25 applications. Alphabetizing the applications within the batch makes it quick and easy to find an application later on.
3. Number the applications in order of alphabetization, starting with the first document in the batch as 00, then 01, 02, 03 and so forth. A batch with 25 applications, for example, would be numbered 00 – 24.
4. Using a 10-key adding machine, add up the 3-month total gross incomes (TGI's) of all of the applications. Add the numbers up twice (i.e., two tapes of figures) so that you are certain the figure is accurate. The Energy Assistance program uses this figure to audit that you have entered the 3-month TGI's correctly when you close the batch.
5. Grab a **Batch Cover Sheet**. The Batch Cover Sheet is a manila folder with a front that looks like the following:

BATCH NUMBER						From	To	Claim Count				
CAP	J	J	J	B	B	S	S	S	S			
1	1	1	2	9	0	0	0	2	4	0	2	5

CAP #	CAP #	3- Digit	0 – 9	First Doc #	Last Doc #	# of Apps
Lewiston: 1	Again	Julian Date	(Seq. #)	In Batch	In Batch	In Batch
Cd'A: 7				(Always 00)		

- In our example above, the batch was created in Lewiston, so the CAP # is 1. The CAP # is entered into the first space on the form.
- The second space is the actual first number of the batch number. The CAP # goes here once more.
- The next three spaces are reserved for the three-digit Julian date for the date that the batch was created, which was May 9<sup>th</sup>, 2002. On your

calendar are two numbers: 129/236 on May 9<sup>th</sup>, 2002. Use the first of the two numbers, in this case 129. (Ignore the JJBB above the blanks).

- The last digit in the batch number is the sequence number from 0 – 9 and is the order in which the batch was created that day. For example, the first batch from May 9<sup>th</sup>, 2002 would have a batch number of **11290**. The second batch created that day would have a batch number of **11291**, the third **11292**, and so on.
- Under the “From” the 00 for the first document number in the batch is already entered for you. The document numbers within the batch always start with **00**.
- Under the “To” enter the document number of the last document in the batch. In our example, there are 25 documents in the batch, so the last document number is 24. This number is always 99 or less.
- Under Claim Count, enter the three-digit number of applications in the batch (25 applications in the batch = 025). This number is always 100 or less.
- On the bottom of the Batch Cover sheet, enter the total sum of the 3-month total gross incomes from all of the applications in the batch in the box next to “Entry.”
- In the box next to “Coded” you will enter the four digit security code that the Energy Assistance program will generate for you when you enter the batch into the system.
- Next to “Date” put the date that you created the batch.

6. Fill out a **Batch Control Sheet**.

1. Under **Date of Batch**, enter the date the batch will be entered into the Energy Assistance Program.
2. Under **Batch Number**, use the following format:

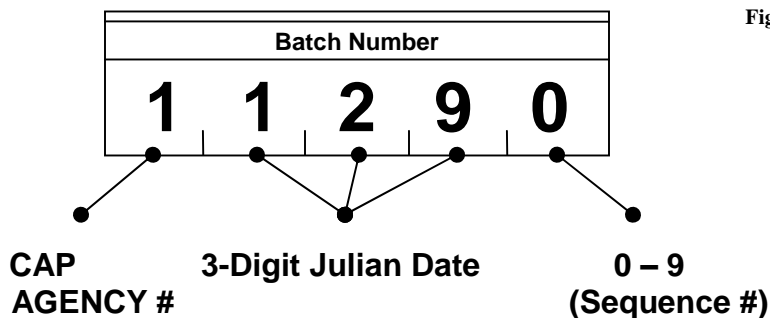
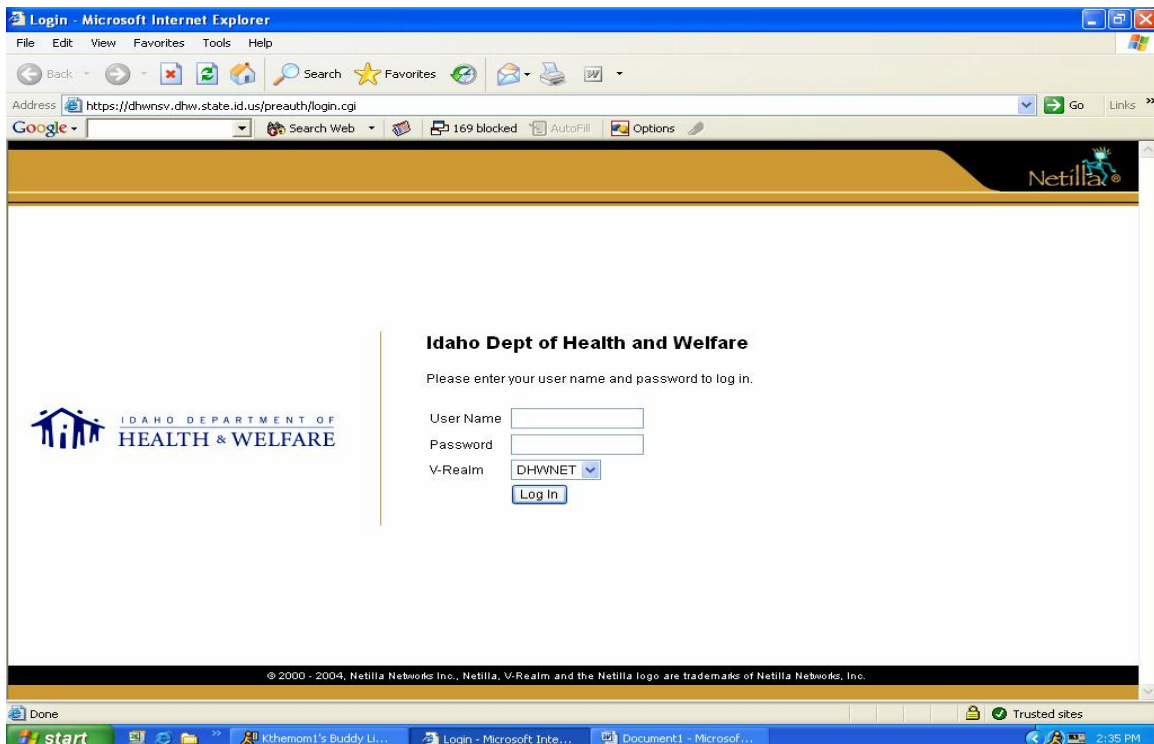
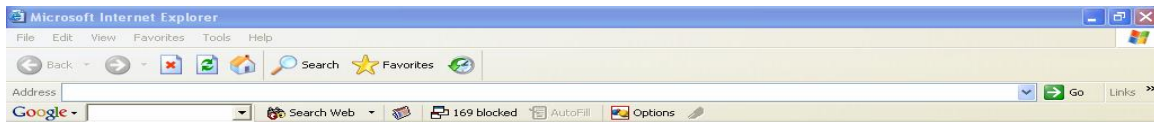


Figure 1: Batch Number

3. Under **Prepared**, enter the date the batch was prepared and initial in the space below the date.
4. Under **Document Numbers**, enter the first document number under **From**, the last document number under **Thru**, and the total number of documents in the batch under **Number of Items**.
5. Under **Control Totals**, enter the total sum of all of the **3-Month Total Gross Incomes** from the applications in the batch (the total from the adding machine tapes) under **DR**.
6. Staple the two tapes from the adding machine to the top right-hand corner of the Batch Control Sheet.
7. Place the applications in the **Batch Cover Sheet** folder with the **Batch Control Sheet** as the first item in the batch.

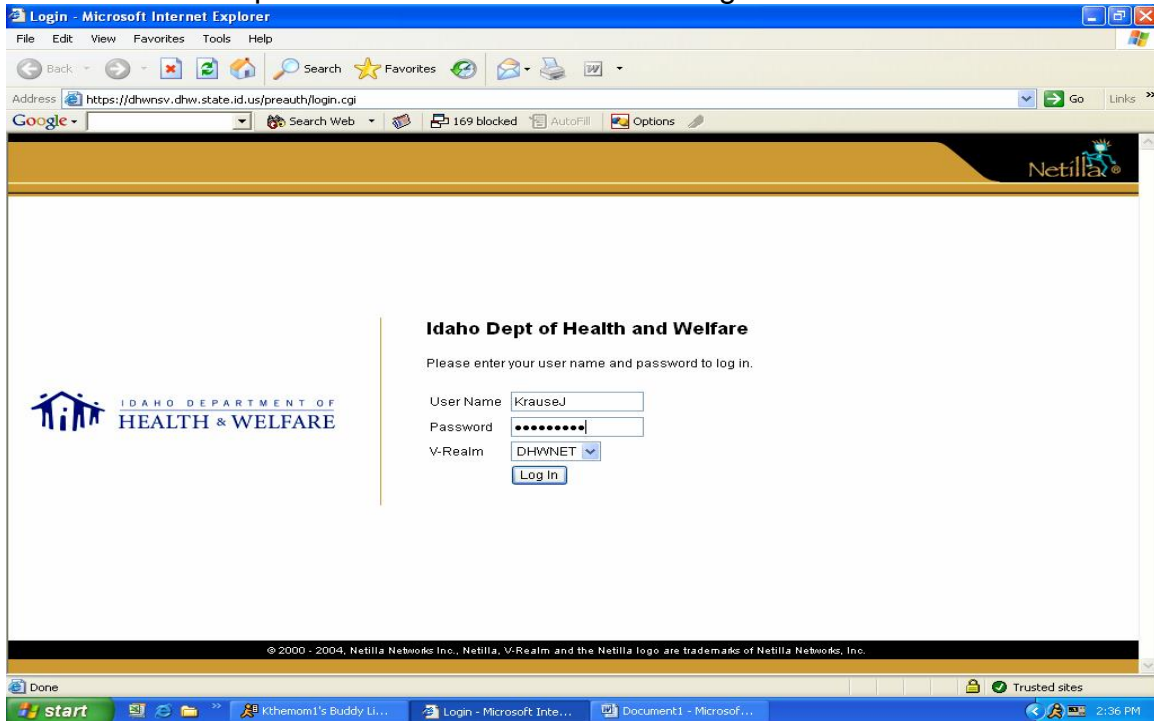
## 07. Idaho Health & Welfare Login Procedure

Make sure you have the FOB (the USB A-Key) in the USB port, then you will click on the icon on your desktop for the Login to H & W. The following will pop up... You must put the correct password for your FOB in.

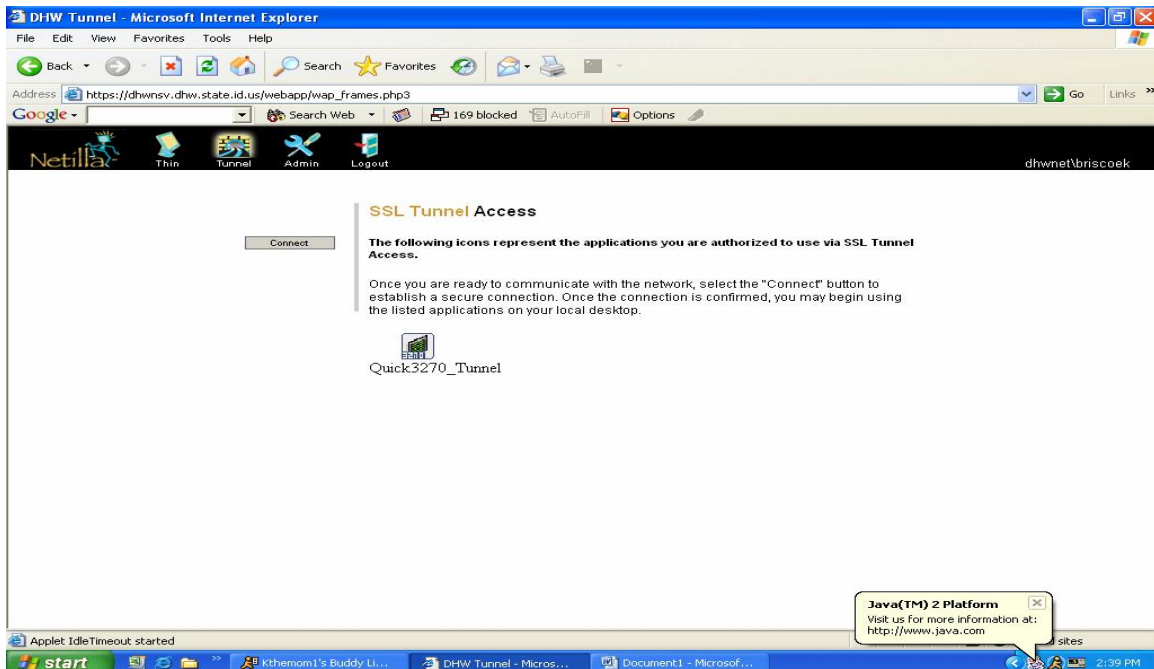




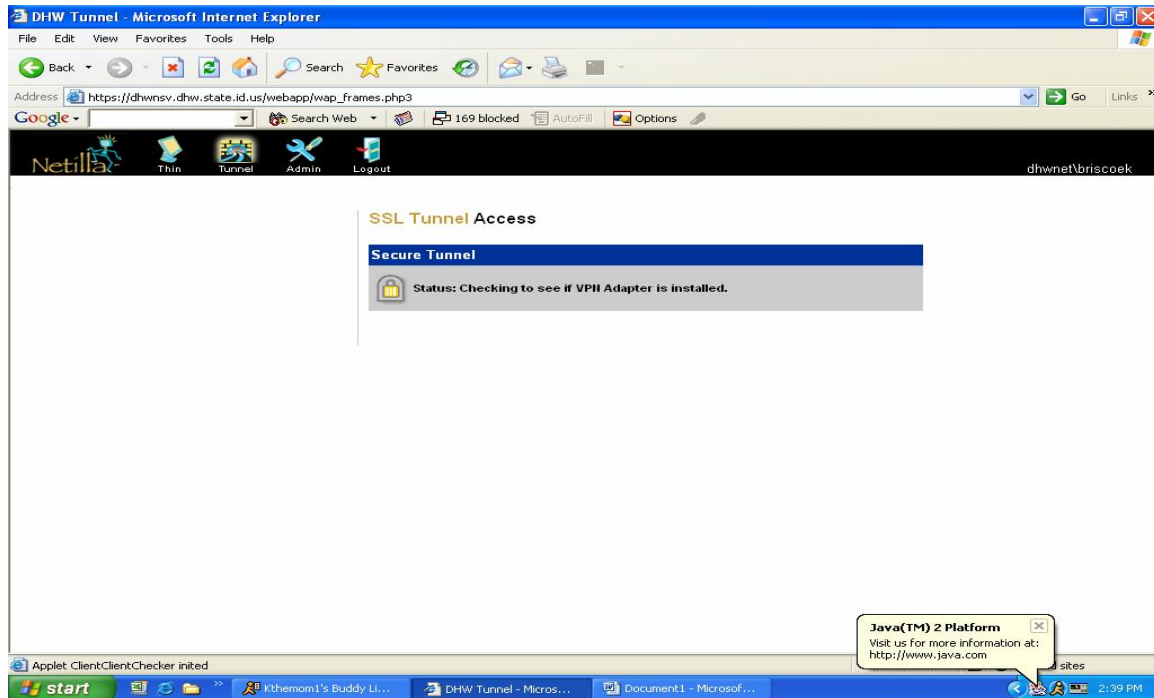
After you have put your FOB password in, you will have this screen come up. You will need to put your Username and password in and then click on Log In.



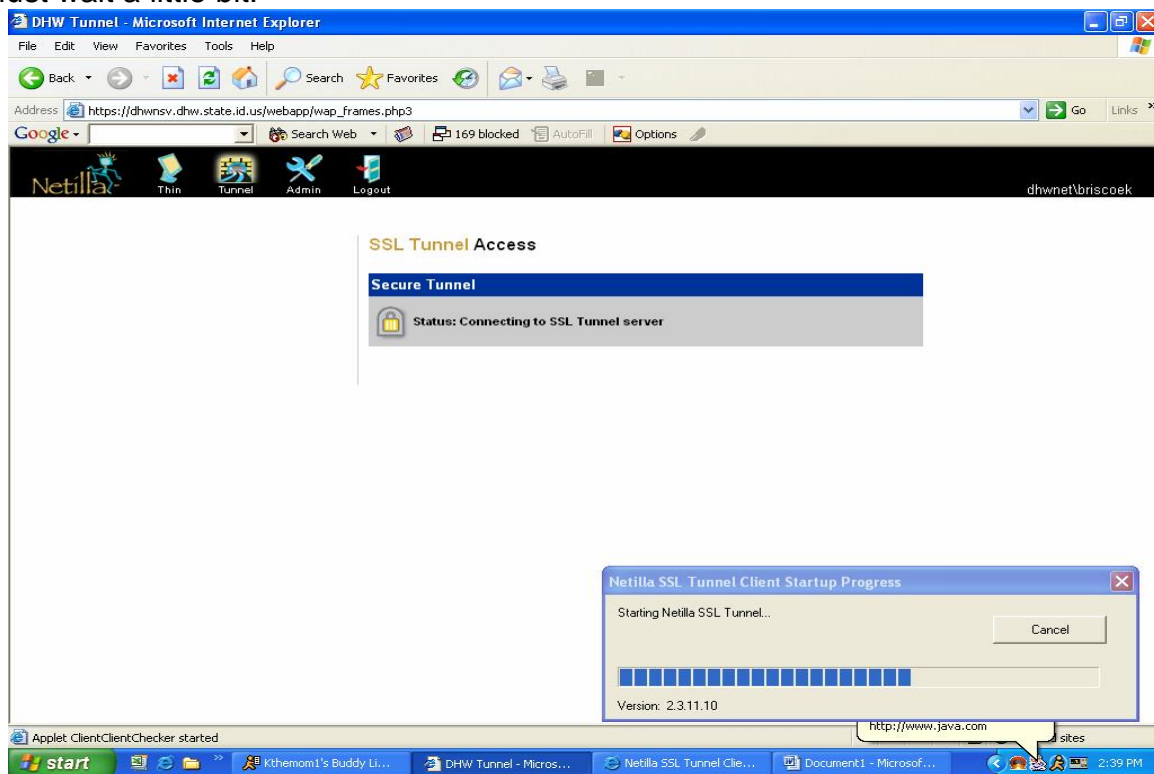
Click on Log in after username and password are input. You might have to do this several times before it kicks in.



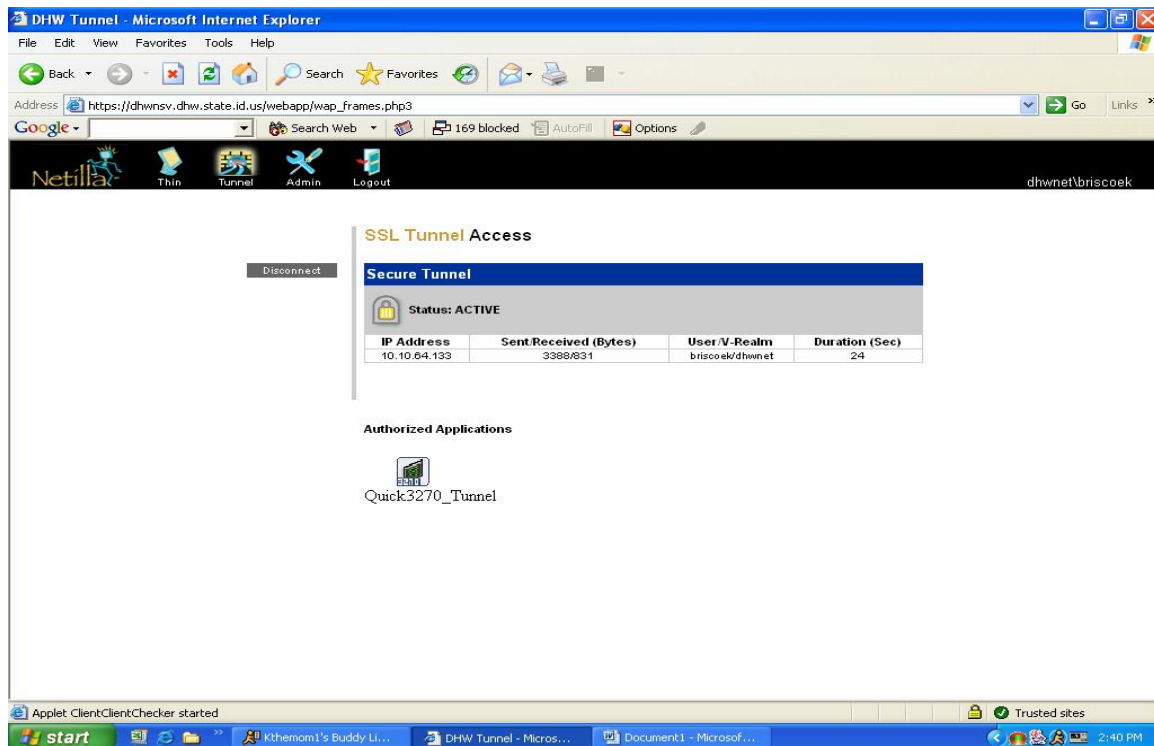
This screen will come up and you must click on Connect... If this screen does not show, please click on the Tunnel Icon in the black tool bar area. You will then get the next screen.



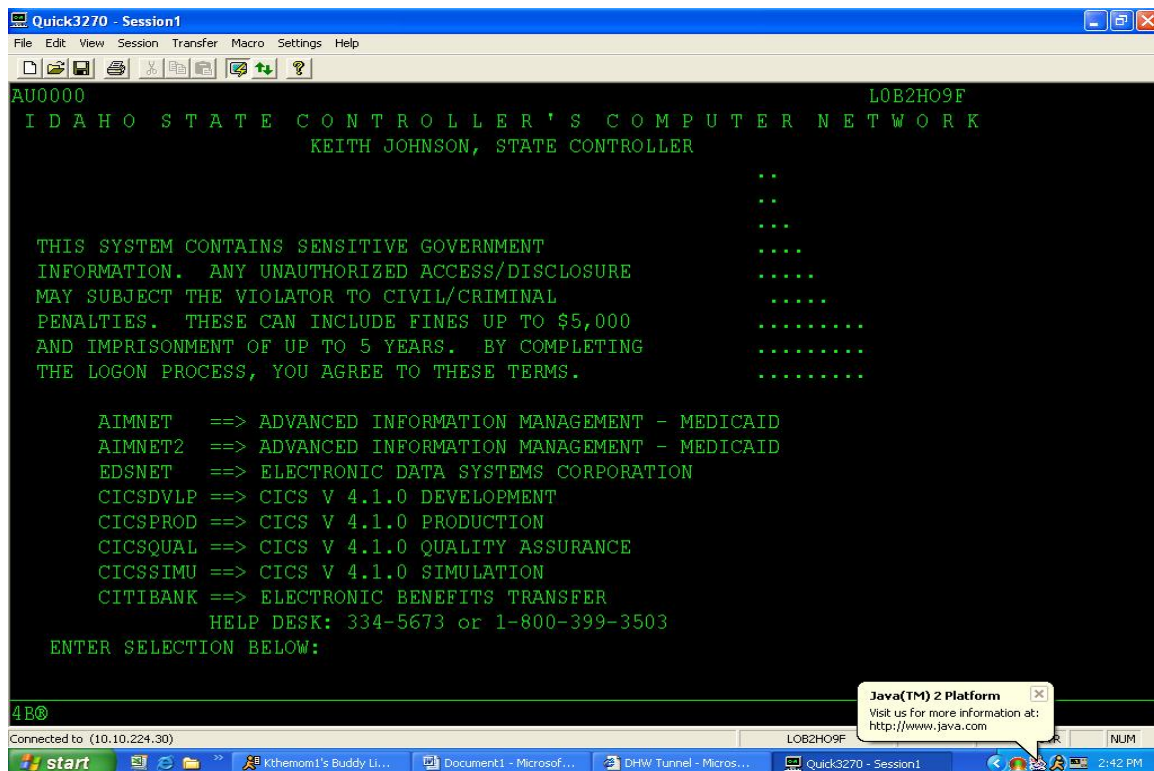
You must wait a little bit.



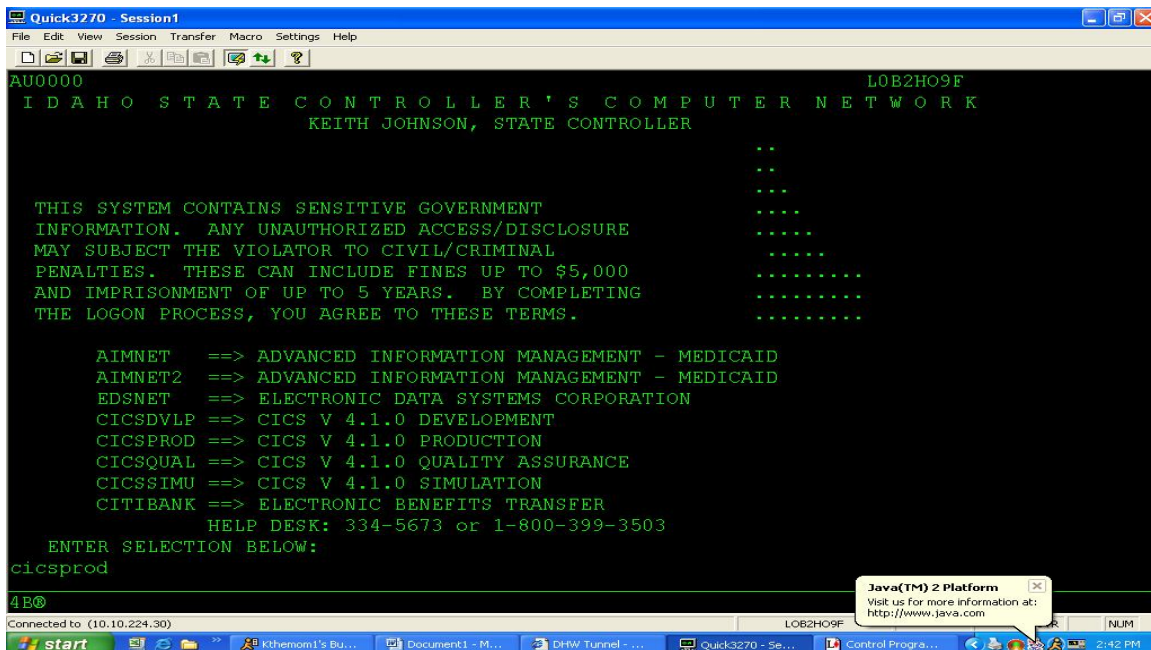
The screen will then tell you that it is starting Netilla SSL Tunnel... this is how your computer will talk to the H & W's mainframe computer.



Once you get this screen, you will notice that it will tell you that you have a SSL Tunnel Access and it gives you an IP Address and validates that you are the user logging in. You must now minimize this window. And go to the icon on your desktop that says "Session 1" and double click on it... you will then get the following screen:



At this screen, you are into Session1 type in cicsprod, then hit **Enter**.



```
Quick3270 - Session1
File Edit View Session Transfer Macro Settings Help
[Icons]
AU0000 L0B2H09F
IDAHO STATE CONTROLLER'S COMPUTER NETWORK
KEITH JOHNSON, STATE CONTROLLER

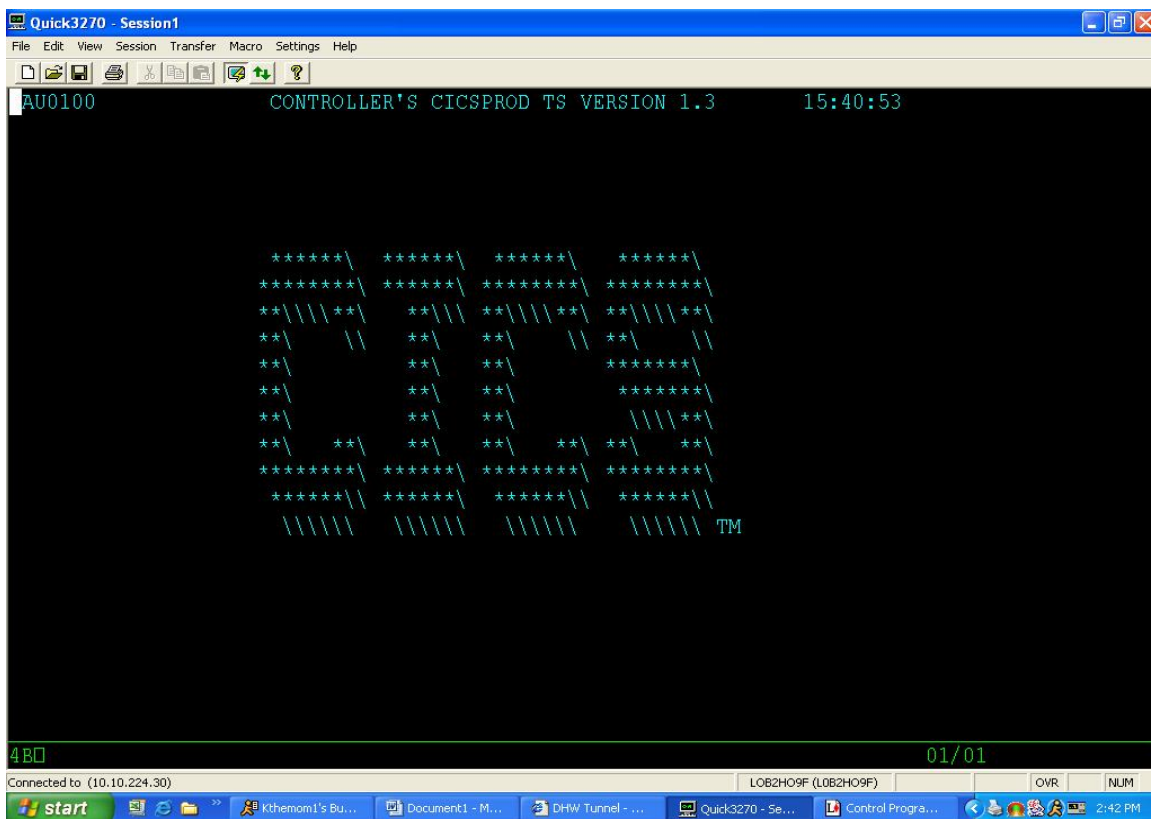
THIS SYSTEM CONTAINS SENSITIVE GOVERNMENT
INFORMATION. ANY UNAUTHORIZED ACCESS/DISCLOSURE
MAY SUBJECT THE VIOLATOR TO CIVIL/CRIMINAL
PENALTIES. THESE CAN INCLUDE FINES UP TO $5,000
AND IMPRISONMENT OF UP TO 5 YEARS. BY COMPLETING
THE LOGON PROCESS, YOU AGREE TO THESE TERMS.

AIMNET ==> ADVANCED INFORMATION MANAGEMENT - MEDICAID
AIMNET2 ==> ADVANCED INFORMATION MANAGEMENT - MEDICAID
EDSNET ==> ELECTRONIC DATA SYSTEMS CORPORATION
CICSDVLP ==> CICS V 4.1.0 DEVELOPMENT
CICSPROD ==> CICS V 4.1.0 PRODUCTION
CICSQUAL ==> CICS V 4.1.0 QUALITY ASSURANCE
CICSSIMU ==> CICS V 4.1.0 SIMULATION
CITIBANK ==> ELECTRONIC BENEFITS TRANSFER
HELP DESK: 334-5673 or 1-800-399-3503
ENTER SELECTION BELOW:
cicsprod
4 B
```

Connected to (10.10.224.30) L0B2H09F

start Kthemom1's Bu... Document1 - M... DHW Tunnel - ... Quick3270 - Se... Control Progra... 2:42 PM

Java(TM) 2 Platform  
Visit us for more information at:  
<http://www.java.com>



```
Quick3270 - Session1
File Edit View Session Transfer Macro Settings Help
[Icons]
AU0100 CONTROLLER'S CICS PROD TS VERSION 1.3 15:40:53

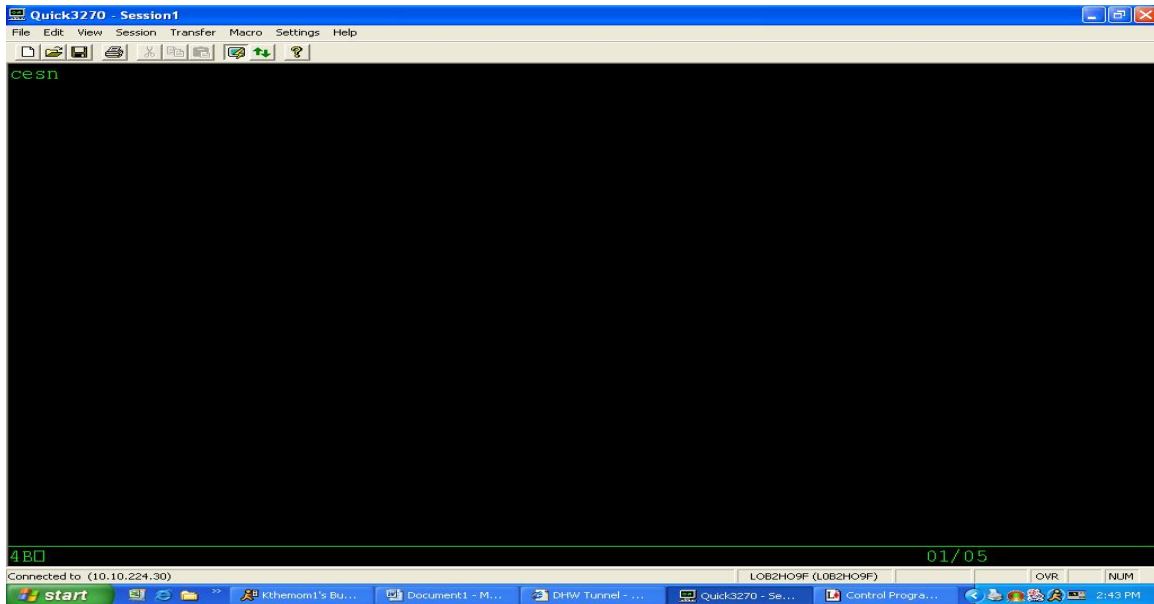
*****\ *****\ *****\ *****\
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||||| ||||| ||||| ||||| TM

4 B 01/01
```

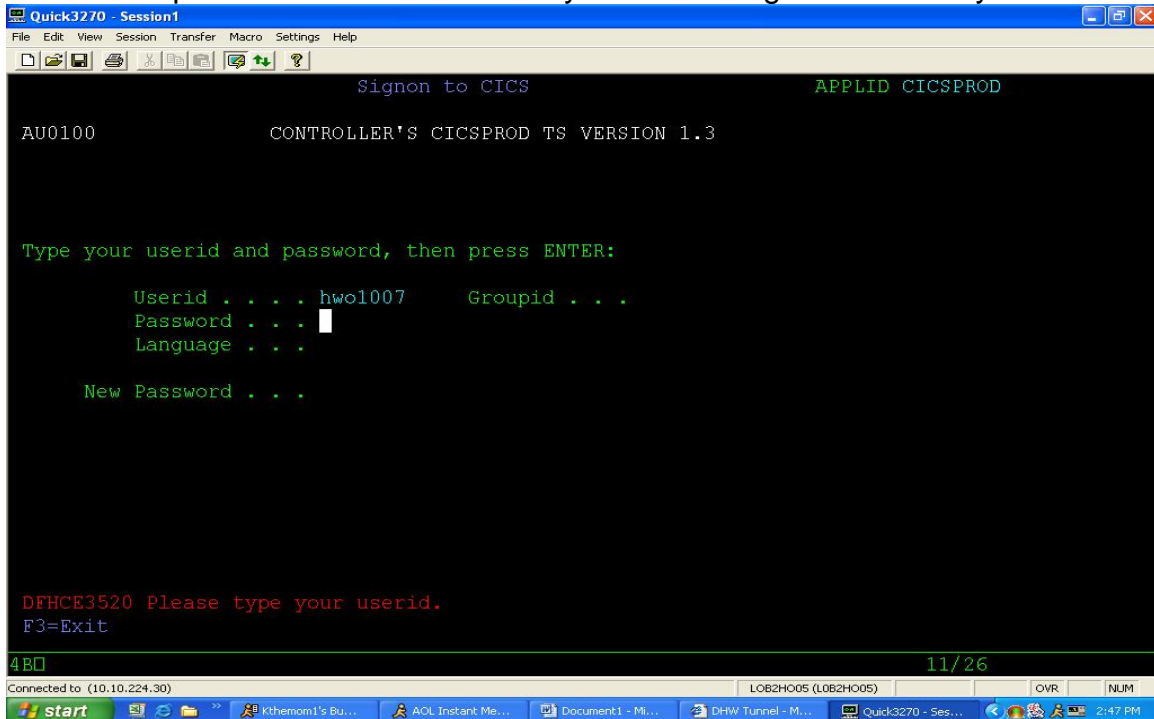
Connected to (10.10.224.30) L0B2H09F (L0B2H09F) OVR NUM

start Kthemom1's Bu... Document1 - M... DHW Tunnel - ... Quick3270 - Se... Control Progra... 2:42 PM

You will need to press the **Pause/Break** key here

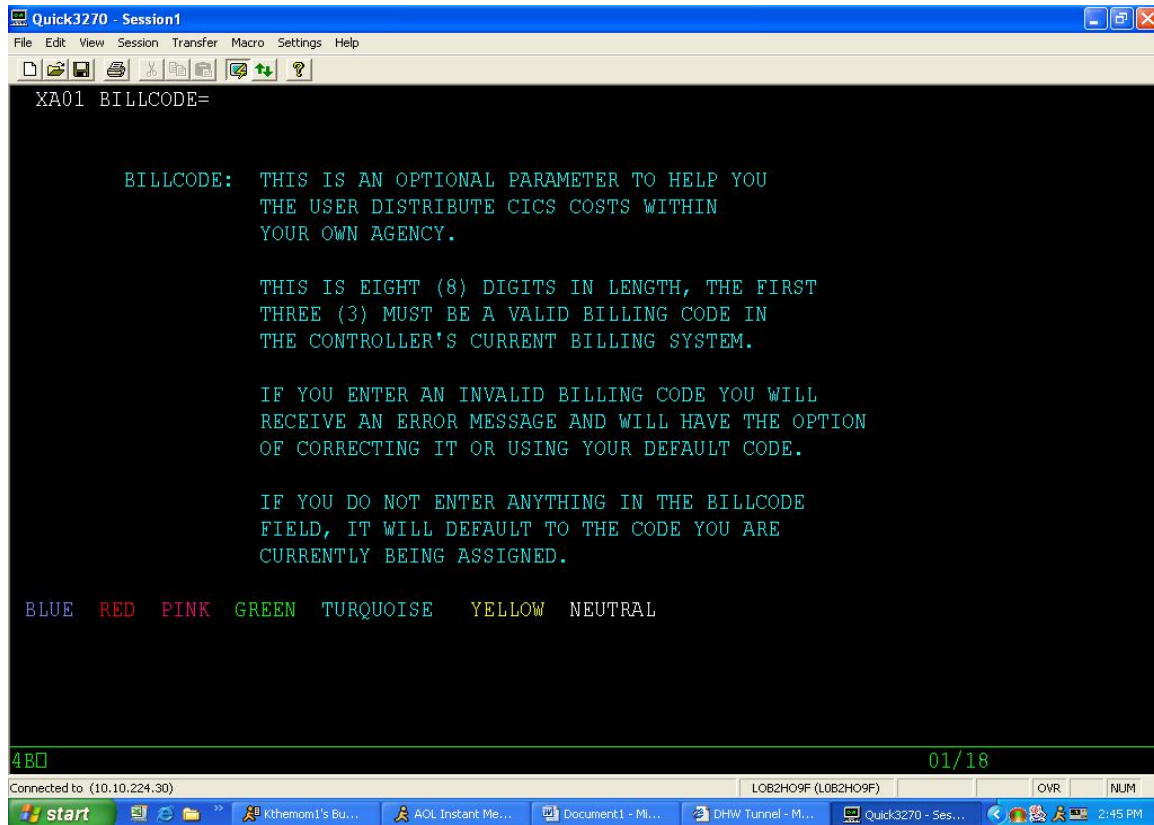


Type in cesn then press **Enter**... this will take you into the log in screen for your HWO #.

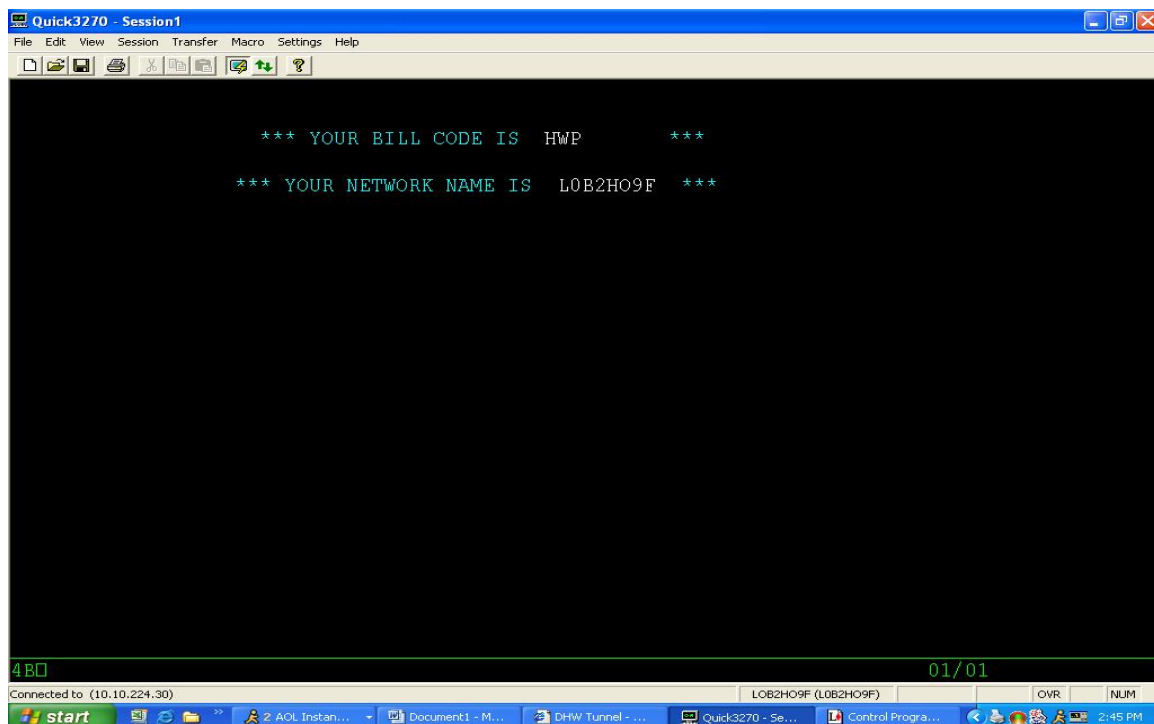


Now you will need to type in your HWO # and tab past the Groupid, input your password, then press **Enter**.

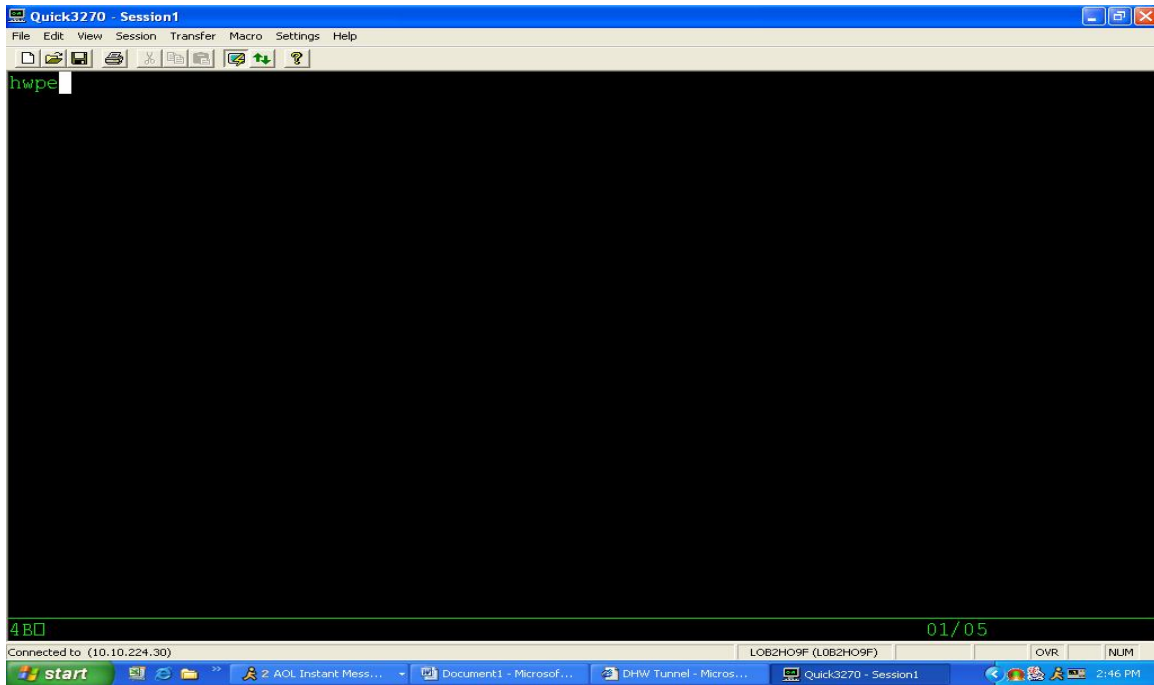




Press the **Pause/Break** key.

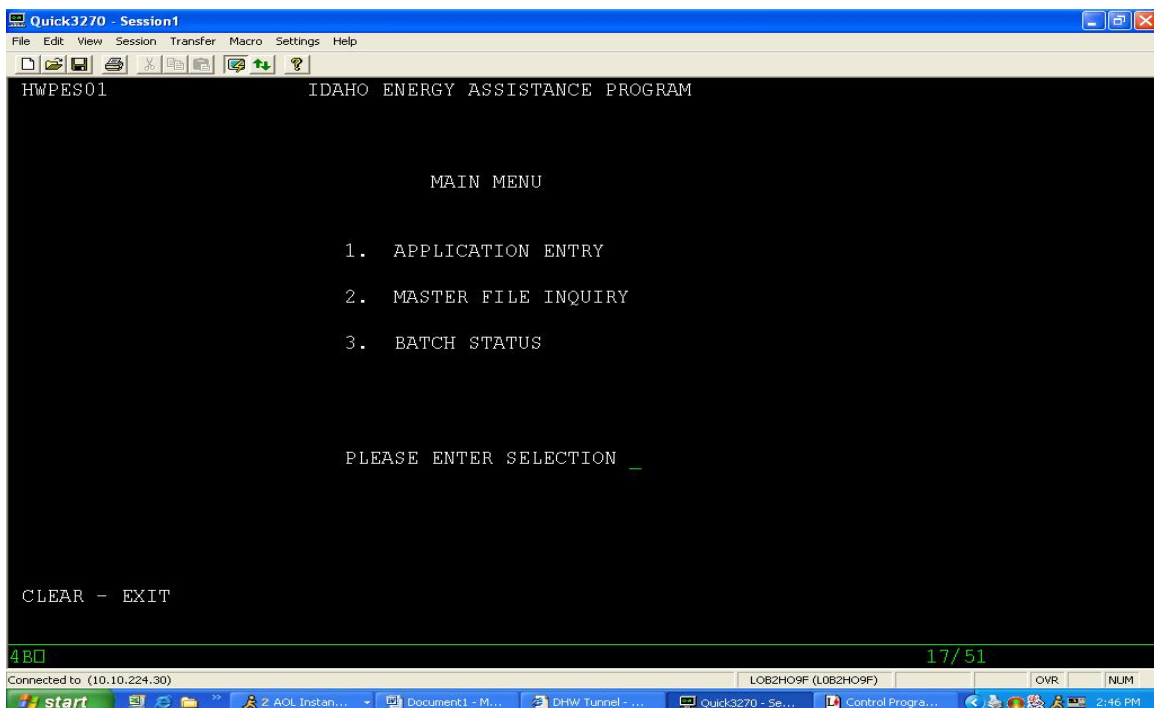


Press the **Pause/Break** key.



Type in HWPE, then press **Enter** to get you into the H & W screen for the LIHEAP program.

If you want to get into EPICS, type in HL01, then press **Enter**.



You are now in the H & W Main Screen for LIHEAP.

When you are done with a batch, please make sure you close the batch by pressing **F12**.

When you need to save a batch and leave it for later, please press **F11**.

To exit the program, please press the **Pause/Break** key.

Remember that if the client is a wood client and the payment needs to be paid directly to them, you must tab over the vendor information.

### **EPICS:**

For EPICS, enter HL01 (H, L, Zero, One) and hit [Enter]. For more information about the EPICS program, please see **Appendix G: EPICS Navigation**.

## **08. Entering a Batch Into the Energy Assistance Program**

1. After you have successfully logged in to the State Controller's Computer and you have navigated to the Energy Assistance Program (HWPE), select 1 for Application Entry. Hit **ENTER**.
2. Enter the CAP # and then the Batch number for the batch you are going to enter into the State Controller's computer. Hit **ENTER**.
3. A window will pop up asking for the sum of the three-month total gross incomes from all of the applications in the batch. Enter this number (you should have it written on the **Batch Cover Sheet** on the bottom right, in the box next to Entry). Hit tab, and then enter the total number of applications in the batch (this is the number at the far right of the boxes at the top of the **Batch Cover Sheet**).
4. A box will pop up giving you a four-digit security code. Write this number on the bottom of the **Batch Cover Sheet** in the box next to "Coded." Write it again on the **Batch Control Sheet** under "For Accounting Services Use Only," in the box next to "Run Code."
5. The screen will now change to the Application Data Entry screen. To navigate through the fields, hit Tab. If the screen beeps at you and you can't type anything, hit **ESC**. Turn your **CAPS LOCK** on so that the application is entered in all-caps.
6. **DOC NO** The first field will be the document number. This is, of course, the number you have written on the top right-hand corner of the front page of the application. The first number in each batch is always 00.
7. **SSN** The next field is, of course, the social security number. This number must be absolutely correct; it cannot be changed later. You don't have to enter any spaces, just the number (e.g. 999999999). Spaces will be entered for you.  
An enhancement to verify social security number data in LIHEAP with social security number data in EPICS has been introduced. This will decrease the amount of duplicate social security numbers in the LIHEAP system and raise the integrity of the data for this program. An pop-up screen showing discrepancies between LIHEAP social security numbers/birth dates and EPICS social security numbers/birth



dates. Press **ENTER** to correct LIHEAP entries. If the LIHEAP values are correct, then change the 'Edit Application (Y/N): value to "N" and press **ENTER**. The blank application screen will be displayed if the pop-up did not appear or an "N" was put into the "Edit Application" field. If the EPICS and LIHEAP data match, nothing will be displayed. Please see **Appendix E: Common Batch Errors** for an example of the pop-up screen. Ensure that any new values appear in the application, save the batch, and return.

8. **APPLICATION DATE** Enter the application date as YYYYMMDD. For example: 20060510 for May 10, 2006.
9. **NAME** Enter the name as LASTNAME FIRSTNAME MIDDLEINITIAL, without commas or dashes. For example, John Quincy Adams would be keyed as **ADAMS JOHN Q**.
10. **MAILING ADDR** If the mailing address and the residence address are the same, enter that address here and leave the **RESIDENCE ADDR** field blank. You are given limited space for both addresses, so if you need to abbreviate, do so, but be consistent with your abbreviations. For example, for Avenue use AVE.
11. **RESIDENCE ADDR** Enter the residence address in this field.
12. **CITY STATE** Enter the city, then two spaces, then the state. Example: **LEWISTON ID**
13. **ZIP** Enter the five-digit zip code in this field. Example: **83501**. If the zips for the mailing address and residence address are different, please enter the mailing address zip code here
14. **COUNTY** Enter the two-digit county code here. For example, Nez Perce County would be keyed as **35**. See **APPENDIX D: County Codes by CAP and City** for the listing of county codes.
15. **PHONE TYPE** In this field, enter either **H** for home phone, or **O** for other phone.
16. **PHONE** Enter the 10-digit phone number (with area code) without dashes or spaces (they will be entered for you). Example: **2085551212**.
17. **VENDOR** Enter the vendor number code in this field. Example: For AVISTA, key **03**. For applications that are being paid as a two-party check (i.e., the check will be sent to the client with both the client's name and the vendor's name on the check), enter **9999**. If the fuel type on the application is **wood** and there is no vendor or the application is **heat in rent**, (i.e., the benefit is being paid directly to the client), **do not enter anything in this field**. If you position the cursor on the VENDOR field and press **F1**, you can select the vendor from a listing. Once the vendor is selected, position cursor and press **ENTER**, entry will appear on the application.
18. **FUEL SUPPLIER** Enter the name of the vendor here only if this will be a two party check. For vendors, if you have the correct vendor number, the correct name will be

written here for you automatically when you are done entering the application and hit **F8 or tab, arrow down button, or you can use your mouse** to go to the next. For applications that are being paid as a two-party check, make sure that you write in the correct vendor name in this field. *If the fuel type on the application is **wood** and there is no vendor or the application is **heat in rent**, (i.e., the benefit is being paid directly to the client), do not enter anything in this field.*

19. **ACCT** Enter in the correct account number from the application. Double check this; if the account number is keyed wrong it will not be noticed by the Energy Assistance Program. It may not even be noticed by the vendor, and you could get a benefit paid to the wrong account if you key the account number incorrectly. If the fuel type on the application is **wood** and there is no vendor, or if the application is **heat in rent**, (i.e., the benefit is being paid directly to the client), do not enter anything in this field.
20. **T \_ O \_ N \_ E \_** When entering an application, you will be using these only if the application is an emergency, or if you are entering a change batch (see **Entering a Change Batch** for more information). If emergency is indicated on the application, enter an **E** into the field next to the **E**. For example: **T \_ O \_ N \_ E E**
21. **BENEFIT** Enter the benefit amount to be awarded in this field. Do NOT enter dollars and cents; the benefit should already be rounded correctly. If the application is being denied, do not enter anything in this field. Example: **261**
22. **DENIAL** If the application is being denied, enter the denial code in this field. For example, if the application is being denied because the household is over income, you would key a **1**. For more information on denials, please see **Denying an Application**. See **Appendix B: Demographic, Household, and Denial Codes** for the listing of denial codes.
23. **APPLICANT DOB** Key the applicant's date of birth here, in YYYYMMDD format. For example: for 3/22/1947, key **19470322**.
24. **SSN DO NOT key the applicant's social security number here...** just tab three times to get to the **RACE** field.
25. **RACE** Key the race classification code from the application here. For these codes, please see **APPENDIX B: Demographic, Household, and Denial Codes**.
26. **SEX** Key the sex code here; 1 for Male, 2 for Female. See **APPENDIX B: Demographic, Household, and Denial Codes**.
27. **CITIZENSHIP** Key the citizenship code here. For these codes, please see **APPENDIX B: Demographic, Household, and Denial Codes**.
28. **SPOUSE** Only key the spouse here if a household member is indicated as the spouse. Key date of birth as YYYYMMDD like all dates on the application (Example: 4/12/1952 would be keyed as **19520412**); SSN is without spaces or dashes (Example: **999999999**). If there is no household member indicated as the spouse,

do not key in this line; just hit the down-arrow key once to move to the first household member.

29. **MEMBER 1, 2, ...** For each household member, key the date of birth as YYYYMMDD, then the SSN without spaces or dashes. Then key the citizenship code (see **APPENDIX B: Demographic, Household, and Denial Codes**). If you run out of lines for the household member, (i.e., there are more than 10 household members in addition to the application and spouse), you'll key a **Y** under **MORE IN HH** later in the application entry.
30. **TARGET** When you have keyed all the household members, use the arrow keys or the tab button to navigate to the target field. In this field, enter the numbers you have written on the bottom left-hand margin of the first page in the application, in successive order, without spaces or dashes. For example, if the household has is over 60 by 9/30/2006, contains a disabled household member, and contains a Native American, you would key **1 2** . If there are no targets, key a **6** . Targets are prioritized by age and disability. For example, if you have a HH that contains an elderly member, a disabled member, and a child under six, you would key a **1 4** . The system only allows keying of two targets, so please ensure that the targets are prioritized prior to entering.
31. **ASSIST** Key the Assists just as you did the Targets, entering the numbers from the bottom right-hand margin of the first page in the application, in successive order, without spaces or dashes. For example, a household that receives food stamps and Social Security would be keyed as **13** .
32. **GROSS INCOME** Key the Final 3-Month Total Gross Income from the front of the application here.
33. **EA HH** Enter the number of household members from the application.
34. **MORE IN HH** Enter **Y** or **N** . If there are more household members than will fit on the application, key **Y** . In most cases, you will key a **N** .
35. **LIVING ARRANGMT** Enter **1, 2, or 3** . Please see **APPENDIX B: Demographic, Household, and Denial Codes** for the correct codes.
36. **HEAT IN RENT** Enter **1 or 2** .If the application indicates yes under "Heat Included in Rent?" please key a **1** . If no, key a **2** . If the client answers "Yes" to both this question and the Rent Subsidized question, the application is denied and you would key a 3 next to **DENIAL** on the application entry, and write a 3 under Denial Code on the application itself.
37. **RENT SUBS** Enter **1 or 2** .If the application indicates yes under "Rent Subsidized?" please key a **1** . If no, key a **2** . They will automatically receive the lowest burden benefit.
38. **HOUSE TYPE** Enter **1 - 9** . Please see **APPENDIX B: Demographic, Household, and Denial Codes** for the correct codes.

39. **PRIMARY HEAT** Enter **1 - 5** . Please see **APPENDIX B: Demographic, Household, and Denial Codes** for the correct codes.
40. **SECONDARY HEAT** Enter **1 - 5** . Please see **APPENDIX B: Demographic, Household, and Denial Codes** for the correct codes. If Secondary Heat is not indicated on the application, leave this field blank.
41. Press **F8** to save the application you have just entered and move on to the next application. You will be notified of any immediate errors (e.g., mis-keying a date) or if you left anything blank that is required, and last but not least if the application should be denied.
42. **Write the batch number on the application.** After you have entered an application into the batch, and you get an error report the following day, write the batch number on the top right hand corner of the first page in the application, to the left of the document number. This makes it much easier to file it back into the batch later, and it also tells you that you have entered the application. For example: 110060--00
43. When you have entered all of the applications in the batch, press **F12** twice to close the batch and get it ready to be entered into the nightly process. If you have to stop entering data and you are not finished with the batch, press **F11** twice to save the batch. Saved batches will not be processed that night.
44. For more information, please see the **Low Income Home Energy Assistance Program Manual**.

## 09. Retrieving and Printing Energy Assistance Reports

1. After you have successfully logged in to the State Controller's Computer, you will need to log on to Microsoft Outlook Web Access.
2. Open your browser (Internet Explorer).
3. Go to this website: <http://idhw.state.id.us>
4. You will be prompted to enter your userid and password. You will use the network name (for e-mail) that is provided to you. For example, if your name is Mickey Mouse, your network name is mouse. (When you enter your userid, you must preface your network name with the characters "dhw/"). Thus:  
  
    Userid: dhw/mousem  
    Password: \*\*\*\*\* (enter your real password)  
    Then click on "OK."
5. If your Inbox is not displayed, click the icon for "Inbox."
6. Double-click on the e-mail message for the report that you want to open.

7. Click on the attachment.
8. When you are prompted, "What would you like to do with this file?" choose "Save this file to disk."
9. Choose the folder where you want this document saved, then click on "Save."
10. When the message appears "Download Complete," click on "Close."
11. Open Microsoft Word.
12. Open the file you just saved.
13. Hit Alt+F8 to bring up the macros window. Make sure that the "FormatDoc" macro is selected<sup>2</sup>, and then hit [Enter]. After you have run the macro, hit Ctrl-A to select all of the text in the document, and then change the font size to 8 point.
14. Print the document. (Shortcut keys: Ctrl-P, then hit [Enter])
15. Save the document. When you are prompted "Do you want to save the document in this format?" click "NO," and then click "SAVE" in the box that opens up. (Shortcut keys: Ctrl-S, then "N", then [Enter])
16. Delete the e-mail message from your "Inbox."
17. For any other documents you want to print, return to Outlook Web Access and repeat steps 6 through 16.
18. Close the Internet Explorer browser window.
19. 3-hole punch the printed reports and file in the appropriate 3-ring binders provided.

## 10. Correcting Batch Errors

One of the reports that you will retrieve and print from the state is a **Batch Error Report** that will notify you of errors you have made in entering a batch. You will need to correct these every day. Please see **APPENDIX E: Common Batch Errors** for a list of common batch errors and how to fix them.

- A. After you have successfully logged into the State Controller's Computer, you will need to navigate to the Energy Assistance Program (HWPE). For instructions on how to do this, please see "Idaho Health & Welfare Login Procedure" located in this manual.

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<sup>2</sup> Note: What the FormatDoc macro does is set the page direction to landscape, the margins to 0.75 on top, 0.25 on bottom, and 0.5 on the left and right. All the macro does not do is change the font size in the document to 8 pt. To do this, hit Ctrl-A to select all the text in the document and then change the font size in the toolbar to 8 pt.

- B. Once you are in HWPE (the Energy Assistance Program), type 1 for Application Entry, then hit [Enter].
- C. On the printed error report you'll see the batch number listed, then a space, and then the document number. For example, 11290 03 will be batch number 11290, document 03. Type in the CAP Agency #, and then the batch #, then press [Enter].
- D. Enter the four-digit security code for the batch (located on the **Batch Cover Sheet** in the box next to "Coded" on the Batch and on the **Batch Control Sheet** in the box next to "Run Code." Press [Enter].
- E. Hit F4 to edit the batch.
- F. You will be automatically given the last document number in the batch that has an error. Hit F7 to go back a document, and F8 to go forward a document. Make the necessary changes on each application, and then hit F8 to go to the next document in the error batch.
- G. When you are all finished correcting the errors in the batch, hit F12 to close the batch, then hit F12 again.

## 11. Correcting Duplicates

The batches you enter throughout the week are processed Thursday night to go out in the payroll Friday morning. Monday or Tuesday you should receive reports in your H & W e-mail notifying you of any address, social security number, or case duplicates. Resolving duplicates requires a different method than correcting an error batch, because the applications have already been processed in the nightly cycle. You can't go into the batch number to fix these; you actually have to create a **Change Batch** in order to make necessary changes. First, however, you need to go over the applications that have 'duped out' to determine what the situation is.

1. **Address Duplicates.** When two applications have the same residence or mailing address, go over the applications carefully to determine why this is the case. Most address duplicates arise because an agency representative forgot to write in an apartment or space number. Check the address verification in the application very carefully to see if this is the case. If the mailing address is the same but the residence addresses are different, then it is possible that one party is having a friend receive their mail for them. If you are unable to find a reason for the duplicate, call the agency representative to get more information about the applicants to see why they have the same address. If you suspect fraud, notify your supervisor immediately so that they can investigate the matter.

If you determine that there is a good reason for the addresses to be the same, alter one application slightly in a change batch (see below for instructions) so that the mailing address is slightly different. For example, if

both parties receive mail at 121 Harper Court, change one application's mailing address to 121 Harper Ct. This will resolve the duplication.

2. **SSN Duplicates.** Under Idaho Energy Assistance regulations, an individual can only receive energy assistance once per heating period. Most SSN duplicates can be resolved without denying an application. Using the Energy Assistance Program, select option 2 from the Main Menu (Master File Inquiry). Type in the social security numbers given to you on the duplicate report to view their application. If you would like to print the application, hit the [Print Screen] button. Study the applications for both parties carefully.

If a SSN is 'duping out' because a person was claimed as a household member on a previous application and is now on their own and applying for assistance personally, then they can be deleted from the older application IF it will not alter the benefit amount on the older application.

To resolve a SSN duplicate, one application or the other must be altered so that the duplicate household members are deleted (see below for instructions on deleting a household member). But be careful: changing the number of household members on an application may alter the benefit amount, or even cause an application to become over income.

3. **Case Duplicates.** Examine the applications on this report very carefully. They are applications that are 'duping out' in which H & W believes they have previously received Energy Assistance this season. If you find a reason why they are 'duping out' and can delete a household member on one or the other of the applications to resolve the problem, do so.

If a case is 'duping out' because the person in question has previously applied or is applying for Energy Assistance towards the same address and/or or vendor account number, they must be denied. Fax the application in question to Brian at H & W with a note explaining that they have previously applied for energy assistance and requesting that he write a denial letter. H & W will issue a denial letter to the applicant stating that they have previously received energy assistance. You must also send a letter to the client on this denial.

No application can be deleted once it has been processed, so those applications who have previously received Energy Assistance will remain on your **SSN Duplicates** and **Case Duplicates** reports until the end of the season.

4. **Making a Change Batch** Change batches are really very simple to make. Once you have gone over the original applications to determine what the best course of action is, make notes in the original application as to the changes you are making and the reasons you are making them, and then put a copy of the first three pages of the application to be put into a change batch.
5. Alphabetize the applications that need to be changed and total up the 3-Month Total Gross Incomes just as if you were creating a regular batch. (***You may make copies of the original application and leave it with this change batch. You must return the original application to its original batch.***)

6. Make a batch cover sheet and a batch control sheet just as if you were making a regular batch.
7. Enter the batch just as you would enter a regular batch, with one change. To indicate an application as a change application, put a **C** next to the **T** in **T \_ O \_ N \_ E \_**. Example: **T C O \_ N \_ E \_**. If the application is an emergency application, it would be keyed as **T C O \_ N \_ E E**. This tells the Energy Assistance Program to overwrite the previous entered application with the changes you have entered.
8. If you need to delete a household member, enter the household member's birth date and social security number in the same line that they were entered into before, but put a **9** in the Citizenship field for the household member you need to delete from the application. Make sure that you change the number of members in the household to reflect the actual number after the household member will be deleted that number will be entered at the bottom of the page first line towards the end. You must also make a note on the original application as to why you changed it and but your initials and date it.
9. When you have entered all of the applications into the change batch, hit **F12** twice to close the batch, just as you would with a regular batch.

## 12. Benefit Changes: Vendor Faxes and Client Letters

Whenever there is a change in the amount of a benefit greater than \$1.00, we need to notify both the vendor and the client within 30 days of the application date. You should do vendor faxes and benefit change letters at least twice a week.



## APPENDIX A: CAP and SAT Codes

"CAP" (agency codes)

▼	
07	CAP (CDA)
01	CAP (Lewiston)
06	EISSA
03	El-Ada
04	SCCAP
05	SEICAA
02	WICAP

"SAT" (satellite office codes)

▼	CAP - CDA
702	Benewah - St. Maries
703	Bonner - Sandpoint
704	Boundary - Bonners
701	Kootenai - CDA
705	Shoshone - Kellogg
▼	CAP - Lewiston
100	Admin
104	Clearwater - Orofino
105	Idaho - Grangeville
106	Latah - Moscow
107	Lewis - Kamiah
102	Valley Food Bank

▼	EICAP
600	Admin - Idaho Falls
603	Haven Homeless Shelter
602	Outreach - Salmon
▼	El-Ada, Inc.
300	Admin
302	Elmore - Mtn. Home
301	Grand Avenue - Boise
303	Owyhee - Homedale
▼	SCCAP
400	Admin (WX only)
404	Blaine
402	Cassia - Burley
403	Jerome
401	Twin Falls

▼	SEICAA
500	Admin
504	American Falls
508	Bear Lake
503	Blackfoot
505	Malad
507	Preston
502	Soda Springs
501	St. Anthony - Pocatello
506	WX - Pocatello
▼	WICAP
200	Admin
201	Adams - Council
202	Canyon - Caldwell
203	Gem/Boise - Emmett
204	Payette - Payette
205	Valley - Cascade
206	Washington - Weiser

## APPENDIX B: Household, Demographic, and Denial Codes

▼	"RELATIONSHIP"	▼	"EMPLOYMENT"	6	"PRIMARY/ 2ndARY HEAT" SOURCE
1	APPLICANT	1	EMPLOYED	1	OIL/PROPANE
2	SPOUSE	2	UNEMPLOYED	2	NATURAL GAS
3	CHILD	3	SELF-EMPLOYED	3	ELECTRICITY
4	RELATIVE	4	SEASONAL TEMPORARY	4	WOOD / PELLETS
5	OTHER	5	RETIRED	5	COAL (including steam heat)
▼	"RACE"	(required >16 yrs old)		7	"FAMILY TYPE"
1	WHITE	▼	"VETERAN"	1	SINGLE PARENT/FEMALE
2	AFRICAN AMERICAN	1	YES	2	SINGLE PARENT/MALE
3	NATIVE AMERICAN	2	NO	3	TWO PARENT HOUSEHOLD
4	HISPANIC	(required >16 yrs old)		4	SINGLE PERSON
5	ASIAN	▼	"HEALTH INSURANCE"	5	TWO ADULTS / NO CHILDREN
▼	"CITIZEN" (required)	1	PRIVATE / EMPLOYER	6	GRANDPARENT/GRANDCHILD
1	US CITIZEN	2	MEDICARE	7	TWO ADULTS WITH CHILDREN
2	REFUGEE	3	MEDICAID	8	OTHER
3	PERMANENT RESIDENT (legal non-citizen)	4	OTHER	X	"DENIAL CODE"
4	NO VISA, ETC. (non-documented non-citizen)	5	NONE	1	Over Income Limit
▼	"DISABLED"	▼	"HOMELESS"	2	Ineligible Institution (housing type 5-9)
1	YES	1	LOCAL HOMELESS	3	Subsidized Rent and Heat in Rent
2	NO	2	TRANSIENT	4	Non-documented Non-citizen (citizenship 4)
▼	"GENDER"	3	< 90 DAYS WITH ANOTHER (leave blank, if not homeless)		
1	MALE	▼	"TARGET"		
2	FEMALE	YES, if one of 4 demographics			
▼	"SSI"	60 yrs old by next Sept. 30th			
1	YES, receiving	Disabled			
2	NO, not receiving	<6 yrs old by date of application			
▼	"SOC SEC"	>1 EA Household Member			
1	YES, receiving	1	"LIVING ARRANGEMENTS"		
2	NO, not receiving	1	OWN HOME		
▼	"TAFI"	2	RENT / LEASE		
1	YES, receiving	3	OTHER		
2	NO, not receiving	2	"HEAT INCLUDED IN RENT?"		
▼	"FOOD STAMPS"	1	YES (ineligible, if rent subsidized)		
1	YES, receiving	2	NO		
2	NO, not receiving	3	"RENT SUBSIDIZED?"		
▼	"FARM WORKER"	1	YES (ineligible, if heat in rent)		
1	MIGRANT	2	NO		
2	SEASONAL	4	"RENT AMOUNT?"		
3	FULL YEAR WORKER	5	"HOUSING TYPE"		
4	NONE APPLIES	1	MOBILE HOME		
▼	"EDUCATION"	2	SINGLE FAMILY DWELLING		
1	0 – 8 GRADE	3	MULTI FAMILY (1-3 Apartment Units)		
2	9 – 12 GRADE	4	MULTI FAMILY (4+ Apartment Units)		
3	HS GRAD / GED	5	NURSING HOME		
4	SOME ED. AFTER HS	6	HOMELESS SHELTER (long-term)		
5	2 – 4 YR COLLEGE GRAD (required >16 yrs old)	7	SHELTER / GROUP HOME		
		8	INSTITUTION		
		9	RETIREMENT CENTER		

ELIGIBILITY COLOR CODING KEY	
	Ineligible for Benefit
	Maybe Ineligible
	Financially Eligible

**All fields on the application are required, unless the LIHEAP manual explicitly states otherwise.**

## **APPENDIX C: Checking Applications**

- A. CHECK FOR TARGETS, write numbers on bottom left-hand margin of first page
  - 1. 60 by 9/30 of the current fiscal Energy Assistance year
  - 2. Disabled
  - 3. Migrant Worker (Code of 1 under Farm Worker)
  - 4. Child Under 6 by Date of Application
  - 5. American Indian (Code of 3 under Race)
  - 6. No Targets
- B. CHECK FOR ASSISTS, write numbers on bottom right-hand margin of first page
  - 1. Food Stamps.
  - 2. SSI/Supplemental Security
  - 3. Social Security
  - 4. TAFI
  - 5. No Assists
- C. CHECK FOR SIGNATURES
  - 1. Income Declaration Page
  - 2. Privacy Act and Information Release Page
  - 3. Self-Declaration of Income
- D. CHECK FOR OUTREACH
- E. CHECK ALL SOCIAL SECURITY NUMBERS
- F. CHECK ALL BIRTHDATES FOR HOUSEHOLD MEMBERS
- G. VERIFY RESIDENCE/ MAILING ADDRESS
- H. CHECK FOR PROOF OF INCOME (See pp. 21-26 in the LIHEAP Program Manual)
- I. CHECK THE MATH THOROUGHLY
  - 1. Correct Matrix? or
  - 2. Consumption Cost rounded correctly?
  - 3. Income (Did they drop the cents on 3-Mo TGI?)
  - 4. Burden Calculation
  - 5. Benefit Calculation
- J. FLAG ANY BENEFIT CHANGES
- K. DOUBLE-CHECK VENDOR ACCOUNT NUMBERS, HEAT TYPE, ETC.
- L. DOUBLE-CHECK NUMBER IN HOUSEHOLD
- M. INITIAL THE APP IN THE BOTTOM RIGHT-HAND CORNER OF THE FIRST PAGE

# APPENDIX D: County Codes by CAP and City

## County Codes and Zip Codes

by CAP and CITY

CAP	CITY	COUNTY CODE	COUNTY	ZIP CODE
1	Ahsahka	18	Clearwater	83520
1	Avon	29	Latah	
1	Blanchard	9	Bonner	83804
1	Bovill	29	Latah	83806
1	Cavendish	35	Nez Perce	
1	Clearwater	25	Idaho	83521
1	Cottonwood	25	Idaho	83522
1	Craigmont	31	Lewis	83523
1	Culdesac	35	Nez Perce	83524
1	Deary	29	Latah	83823
1	Elk City	25	Idaho	83525
1	Elk River	18	Clearwater	83827
1	Fenn	25	Idaho	83531
1	Ferdinand	25	Idaho	83526
1	Genesee	29	Latah	83832
1	Gifford	35	Nez Perce	
1	Golden	25	Idaho	
1	Grangemount	18	Clearwater	
1	Grangeville	25	Idaho	83530
1	Greencreek	25	Idaho	83533
1	Greer	18	Clearwater	83544
1	Harpster	25	Idaho	
1	Harvard	29	Latah	83834
1	Headquarters	18	Clearwater	83534
1	Helmer	29	Latah	83823
1	Joel	29	Latah	
1	Juliaetta	29	Latah	83535
1	Kamiah	31	Lewis	83536
1	Kendrick	29	Latah	83537
1	Keuterville	25	Idaho	83538
1	Kooskia	25	Idaho	83539
1	Lapwai	35	Nez Perce	83540

1	Lenore	35	Nez Perce	83541
1	Lewiston	35	Nez Perce	83501
1	Lowell	25	Idaho	83539
1	Lucile	25	Idaho	83542
1	Melrose	35	Nez Perce	
1	Mohler	31	Lewis	
1	Moscow	29	Latah	83843
1	Mount Idaho	25	Idaho	
1	Murtle	35	Nez Perce	
1	Nezperce	31	Lewis	83543
1	Onaway	29	Latah	83855
1	Orofino	18	Clearwater	83544
1	Orogrande	25	Idaho	
1	Peck	35	Nez Perce	83545
1	Pierce	18	Clearwater	83546
1	Pollock	25	Idaho	83547
1	Potlatch	29	Latah	83855
1	Priceton	29	Latah	83857
1	Reubens	31	Lewis	83548
1	Riggins	25	Idaho	83549
1	Southwick	35	Nez Perce	83537
1	Spalding	35	Nez Perce	83551
1	Stites	25	Idaho	83552
1	Troy	29	Latah	83871
1	Viola	29	Latah	83872
1	Waha	35	Nez Perce	
1	Warren	25	Idaho	83671
1	Weippe	18	Clearwater	83553
1	White Bird	25	Idaho	83554
1	Winchester	31	Lewis	83555
1	Woodland	25	Idaho	

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CAP	CITY	COUNTY CODE	COUNTY	ZIP CODE
2	Banks	8	Boise	83602
2	Bowmount	14	Canyon	83686
2	Caldwell	14	Canyon	83605-83607
2	Cambridge	44	Washington	83610
2	Cascade	43	Valley	83611
2	Centerville	8	Boise	83631
2	Council	2	Adams	83612
2	Crouch	8	Boise	83622
2	Dixie	44	Washington	83525
2	Donnelly	43	Valley	83615
2	Emmett	23	Gem	83617
2	Fruitland	38	Payette	83620
2	Fruitvale	2	Adams	83612
2	Garden Valley	8	Boise	83622
2	Gardena	8	Boise	83629
2	Greenleaf	14	Canyon	83626
2	Horseshoe Bend	8	Boise	83629
2	Huston	14	Canyon	83630
2	Idaho City	8	Boise	83631
2	Indian Valley	2	Adams	83632
2	Lake Fork	43	Valley	83635
2	Letha	23	Gem	83636
2	Lowman	8	Boise	83637
2	McCall	43	Valley	83638
2	Meadows	2	Adams	83654

2	Melba	14	Canyon	83641
2	Mesa	2	Adams	83643
2	Middleton	14	Canyon	83644
2	Midvale	44	Washington	83645
2	Montour	23	Gem	83617
2	Nampa	14	Canyon	83651
2	New Meadows	2	Adams	83654
2	New Plymouth	38	Payette	83655
2	Notus	14	Canyon	83656
2	Ola	23	Gem	83657
2	Parma	14	Canyon	83660
2	Payette	38	Payette	83661
2	Pearl	23	Gem	83616
2	Pioneerville	8	Boise	83631
2	Placerville	8	Boise	83666
2	Roswell	14	Canyon	83660
2	Smith's Ferry	43	Valley	83668
2	Starkey	2	Adams	
2	Stibnite	43	Valley	83677
2	Sweet	23	Gem	83670
2	Tamarack	2	Adams	83612
2	Weiser	44	Washington	83672
2	Wilder	14	Canyon	83676
2	Yellow Pine	43	Valley	83677

CAP	CITY	COUNTY CODE	COUNTY	ZIP CODE
3	Atlanta	20	Elmore	83601
3	Boise	1	Ada	83701-83799
3	Bruneau	37	Owyhee	83604
3	Eagle	1	Ada	83616
3	Featherville	20	Elmore	83647
3	Garden City	1	Ada	83622
3	Givens Hot Springs	37	Owyhee	83641
3	Glenns Ferry	20	Elmore	83623
3	Grandview	37	Owyhee	83624
3	Hammett	20	Elmore	83627
3	Homedale	37	Owyhee	83628
3	King Hill	20	Elmore	83633
3	Kuna	1	Ada	83634
3	Marsing	37	Owyhee	83639

3	Mayfield	20	Elmore	83716
3	Meridian	1	Ada	83642
3	Mountain Home	20	Elmore	83647
3	Murphy	37	Owyhee	83650
3	Orchard	1	Ada	83704
3	Oreana	37	Owyhee	83650
3	Pine	20	Elmore	83647
3	Reynolds	37	Owyhee	83650
3	Riddle	37	Owyhee	83604
3	Rocky Bar	20	Elmore	83647
3	Silver City	37	Owyhee	83650
3	Star	1	Ada	83669
3	Triangle	37	Owyhee	

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CAP	CITY	COUNTY CODE	COUNTY	ZIP CODE
4	Acequia	34	Minidoka	83350
4	Albion	16	Cassia	83311
4	Almo	16	Cassia	83312
4	Bellevue	7	Blaine	83313
4	Bliss	24	Gooding	83314
4	Bridge	16	Cassia	
4	Buhl	42	Twin Falls	83316
4	Burley	16	Cassia	83318
4	Carey	7	Blaine	83320
4	Castleford	42	Twin Falls	83321
4	Corral	13	Camas	83322
4	Declo	16	Cassia	83323
4	Dietrich	32	Lincoln	83324
4	Eden	27	Jerome	83325
4	Elba	16	Cassia	83326
4	Fairfield	13	Camas	83327
4	Filer	42	Twin Falls	83236
4	Gannett	7	Blaine	83621
4	Gooding	24	Gooding	83330
4	Hagerman	24	Gooding	83332
4	Hailey	7	Blaine	83333
4	Hansen	42	Twin Falls	83334
4	Hazelton	27	Jerome	83335
4	Heyburn	34	Minidoka	83336

4	Hill City	13	Camas	83337
4	Hollister	42	Twin Falls	83301
4	Jerome	27	Jerome	83338
4	Ketchum	7	Blaine	83340
4	Kimama	32	Lincoln	
4	Kimberly	42	Twin Falls	83341
4	Malta	16	Cassia	83342
4	Marion	16	Cassia	
4	Minikoka	34	Minidoka	83343
4	Murtaugh	42	Twin Falls	83344
4	Naf	16	Cassia	83345
4	Oakley	16	Cassia	83346
4	Paul	34	Minidoka	83347
4	Picabo	7	Blaine	83348
4	Richfield	32	Lincoln	83349
4	Rock Creek	42	Twin Falls	83334
4	Rogerson	42	Twin Falls	83302
4	Rupert	34	Minidoka	83350
4	Shoshone	32	Lincoln	83352
4	Sun Valley	7	Blaine	83353
4	Tuttle	24	Gooding	83314
4	Twin Falls	42	Twin Falls	83301
4	Wendell	24	Gooding	83355

CAP	CITY	COUNTY CODE	COUNTY	ZIP CODE
5	Aberdeen	6	Bingham	83210
5	Alpine	15	Caribou	83315
5	Alridge	6	Bingham	83312
5	American Falls	39	Power	83211
5	Arbon	39	Power	83212
5	Arimo	3	Bannock	83214
5	Atomic City	6	Bingham	83215
5	Bancroft	15	Caribou	83217
5	Banida	21	Franklin	83264
5	Basalt	6	Bingham	83218
5	Bennington	4	Bear Lake	83219
5	Bern	4	Bear Lake	83220
5	Blackfoot	6	Bingham	83221
5	Bloomington	4	Bear Lake	83223
5	Chubbuck	3	Bannock	83202
5	Clifton	21	Franklin	83228
5	Conda	15	Caribou	83230
5	Dayton	21	Franklin	83232
5	Dingle	4	Bear Lake	83233
5	Downey	3	Bannock	83234
5	Fairview	21	Franklin	
5	Firth	6	Bingham	83261
5	Fish Haven	4	Bear Lake	83203
5	Fort Hall	6	Bingham	83237
5	Franklin	21	Franklin	83619
5	Geneva	4	Bear Lake	83238
5	Georgetown	4	Bear Lake	83239
5	Grace	15	Caribou	83241
5	Holbrook	36	Oneida	83243
5	Inkom	3	Bannock	83245
5	Lava Hot Springs	3	Bannock	83246
5	Lund	15	Caribou	83217
5	Malad	36	Oneida	83252

5	McCammon	3	Bannock	83250
5	Mink Creek	21	Franklin	
5	Montpelier	4	Bear Lake	83254
5	Moreland	6	Bingham	83256
5	Nounan	4	Bear Lake	83254
5	Ovid	4	Bear Lake	83260
5	Oxford	21	Franklin	
5	Paris	4	Bear Lake	83261
5	Pauline	39	Power	
5	Pingree	6	Bingham	83262
5	Pocatello	3	Bannock	83201
5	Portneuf	3	Bannock	
5	Preston	21	Franklin	83263
5	Riverdale	21	Franklin	83263
5	Riverside	6	Bingham	83221
5	Roberts	26	Jefferson	83444
5	Robin	3	Bannock	83214
5	Rockford	6	Bingham	83221
5	Rockland	39	Power	83271
5	Samaria	36	Oneida	83252
5	Shelley	6	Bingham	83274
5	Soda Springs	15	Caribou	83276
5	Springfield	6	Bingham	83277
5	St. Charles	4	Bear Lake	83272
5	Sterling	6	Bingham	83279
5	Stone	36	Oneida	83280
5	Swanlake	3	Bannock	83281
5	Thatcher	21	Franklin	83283
5	Virginia	3	Bannock	83234
5	Waylan	15	Caribou	83285
5	Weston	21	Franklin	83286
5	Whitney	21	Franklin	

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CAP	CITY	COUNTY CODE	COUNTY	ZIP CODE
6	Ammon	10	Bonneville	83401
6	Arco	12	Butte	83213
6	Ashton	22	Fremont	83420
6	Baker	30	Lemhi	83467
6	Bone	10	Bonneville	83401
6	Butte City	12	Butte	
6	Carmen	30	Lemhi	83462
6	Challis	19	Custer	83226
6	Chester	22	Fremont	83421
6	Clayton	19	Custer	83227
6	Cobalt	30	Lemhi	83229
6	Darlington	12	Butte	83231
6	Driggs	41	Teton	83422
6	Drummond	22	Fremont	83420
6	Dubois	17	Clark	83423
6	Ellis	19	Custer	83235
6	Felt	41	Teton	83424
6	Gibbonsville	30	Lemhi	83463
6	Gilmore	30	Lemhi	
6	Hamer	26	Jefferson	83425
6	Heise	26	Jefferson	83443
6	Howe	12	Butte	83244
6	Humphrey	17	Clark	83446
6	Idaho Falls	10	Bonneville	83401
6	Iona	10	Bonneville	83427
6	Irwin	10	Bonneville	83428
6	Island Park	22	Fremont	83429
6	Kilgore	17	Clark	83423
6	Leadore	30	Lemhi	83464
6	Lemhi	30	Lemhi	83465
6	Leslie	19	Custer	83249
6	Lewisville	26	Jefferson	83431
6	Lincoln	10	Bonneville	83401
6	Lorenzo	26	Jefferson	83442

6	Mackay	19	Custer	83251
6	Macks Inn	22	Fremont	83433
6	Marysville	22	Fremont	83420
6	May	30	Lemhi	83253
6	Menan	26	Jefferson	83434
6	Monteview	26	Jefferson	83435
6	Moore	12	Butte	83255
6	Mud Lake	26	Jefferson	83450
6	Newdale	22	Fremont	83436
6	North Fork	30	Lemhi	83466
6	Obsidian	19	Custer	83340
6	Palisades	10	Bonneville	83437
6	Parker	22	Fremont	83438
6	Patterson	30	Lemhi	83253
6	Rexburg	33	Madison	83440
6	Rigby	26	Jefferson	83442
6	Ririe	10	Bonneville	83443
6	Salmon	30	Lemhi	83467
6	Shoup	30	Lemhi	83469
6	Spencer	17	Clark	83446
6	Squirrel	22	Fremont	83447
6	St. Anthony	22	Fremont	83445
6	Stanley	19	Custer	83278
6	Sugar City	33	Madison	83448
6	Sunbeam	19	Custer	83278
6	Swan Valley	10	Bonneville	83449
6	Tendoy	30	Lemhi	83468
6	Terreton	26	Jefferson	83450
6	Teton	22	Fremont	83451
6	Tetonia	41	Teton	83452
6	Thornton	33	Madison	83440
6	Ucon	10	Bonneville	83454
6	Victor	41	Teton	83455
6	Warm River	22	Fremont	83420



CAP	CITY	COUNTY CODE	COUNTY	ZIP CODE
7	Athol	28	Kootenai	83801
7	Avery	40	Shoshone	83802
7	Bayview	28	Kootenai	83803
7	Bonner's Ferry	11	Boundary	83805
7	Burke	40	Shoshone	83807
7	Cabinet	9	Bonner	83811
7	Calder	40	Shoshone	83808
7	Careywood	9	Bonner	83809
7	Cataldo	28	Kootenai	83810
7	Chatcolet	5	Benewah	
7	Clark Fork	9	Bonner	83811
7	Clarkia	40	Shoshone	83812
7	Cocalalla	9	Bonner	83813
7	Coeur d'Alene	28	Kootenai	83814-83816
7	Colburn	9	Bonner	83865
7	Coolin	9	Bonner	83821
7	Copeland	11	Boundary	83805
7	Dalton Gardens	28	Kootenai	83814
7	Desmet	5	Benewah	83824
7	Dover	9	Bonner	83825
7	East Hope	9	Bonner	83836
7	Eastport	11	Boundary	83826
7	Edgemere	9	Bonner	
7	Elmira	9	Bonner	
7	Emida	5	Benewah	
7	Enaville	40	Shoshone	83829
7	Fernan Lake	28	Kootenai	83830
7	Fernwood	5	Benewah	83328
7	Garfield Bay	9	Bonner	
7	Garwood	28	Kootenai	83835
7	Gem	40	Shoshone	
7	Granite	9	Bonner	83801
7	Harrison	28	Kootenai	83833
7	Hauser	28	Kootenai	83854
7	Hayden	28	Kootenai	83835
7	Hayden Lake	28	Kootenai	83835
7	Hope	9	Bonner	83836
7	Huetter	28	Kootenai	
7	Kellogg	40	Shoshone	83837
7	Kingston	40	Shoshone	83839

7	Kootenai	9	Bonner	83840
7	Laclede	9	Bonner	83841
7	Lakeview	9	Bonner	
7	Lane	28	Kootenai	
7	Meadow Creek	11	Boundary	
7	Medimont	28	Kootenai	83842
7	Moravia	11	Boundary	
7	Moyie Springs	11	Boundary	83845
7	Murray	40	Shoshone	83874
7	Naples	11	Boundary	83847
7	Nordman	9	Bonner	83848
7	Oldtown	9	Bonner	83822
7	Osburn	40	Shoshone	83849
7	Pinehurst	40	Shoshone	83850
7	Plummer	5	Benewah	83851
7	Ponderay	9	Bonner	83852
7	Porthill	11	Boundary	83853
7	Post Falls	28	Kootenai	83854
7	Prichard	40	Shoshone	83873
7	Priest River	9	Bonner	83856
7	Rathdrum	28	Kootenai	83858
7	Rose Lake	28	Kootenai	83810
7	Sagle	9	Bonner	83860
7	Samuels	9	Bonner	83862
7	Sanders	5	Benewah	83870
7	Sandpoint	9	Bonner	83864
7	Santa	5	Benewah	83866
7	Silverton	40	Shoshone	83867
7	Smelterville	40	Shoshone	83868
7	Spirit Lake	28	Kootenai	83869
7	Springston	28	Kootenai	
7	St. Joe	5	Benewah	
7	St. Maries	5	Benewah	83861
7	State Line	28	Kootenai	83854
7	Tensed	5	Benewah	83870
7	Wallace	40	Shoshone	83873
7	Wardner	40	Shoshone	83837
7	Westmond	9	Bonner	
7	Worley	28	Kootenai	83876

## Out of State

CAP	CITY	COUNTY CODE	COUNTY	ZIP CODE
	Owyhee, NV	37	Owyhee	89832
	Ontario, OR	38	Payette	97914
	Newport, WA	9	Bonner	99156

## APPENDIX E: Common Batch Errors

CASE NUMBER ERROR CODE	CASE NAME FIELD IN ERROR	BATCH DOC FIELD SHOULD BE	ERROR DESCRIPTION
999-99-9999	DOE JOHN	11271 02	
0315	01	03	ON NEW CASES WITH 10 OR LESS IN HH, NUMBER MUST = TOTAL OF THOSE WITH VALID RES STATUS
0715	\$\$\$\$\$		EMERGENCY INDICATED ON CASE DETERMINED INELIGIBLE

This error is indicating that you have incorrectly entered the number of household members... take a look at the original application to determine what the correct number in the household should be, and enter it into the application in the error batch.

“EMERGENCY INDICATED ON CASE DETERMINED INELIGIBLE” merely means that the error is occurring on an application indicated as Emergency. When you fix the first error, this error will be fixed as well.

888-88-8888	DOE JANE	11271 04	
0465	11/06/2000	MEMBER FLAG OF 4 SET	HOUSEHOLD MEMBERSHIP CAT. – DOES NOT MATCH BIRTH DATE
0715	\$\$\$\$\$		EMERGENCY INDICATED ON CASE DETERMINED INELIGIBLE

This error is indicating that you have forgotten to key a target of 4. It will show you the birth date of the household member that is under the age of 6 by the application date.

777-77-7777	DOE JIM	11271 11	
0465	MEMBER FLAG OF 4 SET	REMOVE CODE : CORR BDAY	HOUSEHOLD MEMBERSHIP CAT. – DOES NOT MATCH BIRTH DATE
0715	\$\$\$\$\$		EMERGENCY INDICATED ON CASE DETERMINED INELIGIBLE

This error is indicating that you have keyed a target of 4 when no household members are under the age of 6 by the application date. Go back through the household members and make sure that the birthdates have been entered correctly. Make the necessary changes as needed.

666-66-6666	DOE JERRY	11271 23	
0465	03/14/1934	MEMBER FLAG OF 1 SET	HOUSEHOLD MEMBERSHIP CAT. – DOES NOT MATCH BIRTH DATE

This error is indicating that you have forgotten to key a target of 1. It will show you the birth date of the household member that is over 60 by 9/30 of the current fiscal Energy Assistance year.

555-55-5555	DOE JONNA	11271 24	
0800	0355	COMPUTED BENEFIT \$0335	CAP ENTERED BENEFIT DOES NOT MATCH DAILY CALCULATED BENEFIT

This error is indicating that the Energy Assistance Program’s calculation of the benefit is different than the benefit amount that you entered. Double-check the benefit calculation from start to finish and make any necessary changes. You can position the cursor on the benefit field and press **F1** for the system to determine the benefit based on the data entered on the application.

## APPENDIX E: Common Batch Errors (Continued)

----- In Liheap -----		----- In EPICS -----			
SSN	DOB	Client	SSN	DOB	Result
223156397	19590112	9032537	223156398	19590112	SSN
507786669	19571029	9032540	507786669	19571030	DOB
014878786	19990330	9032538	014878787	19990331	SSN, DOB
518486215	19990809	9032539	518486215	19990809	Exact
519479419	19950701	0593386	519479419	19950701	Exact
603015454	20050301				Not in EPICS

If changes to the SSN and/or DOB are required, press **ENTER**.

Enter 'Y' to go back to the application screen.

Enter 'N' to go to the next application screen.

Not that the SSN/DOB screen of corrects EPICS values will not be shown if LIHEAP values match the EPICS values.

Ensure that the new values appear in the application, save the batch, and return.

## APPENDIX F: State Database Data Entry

**Never give your username and/or your password to anyone.**

**Never make a new file for someone that is already in the database.**

**Always search by SSN.** If SSN is not found, search by last name and make sure to check both the applicant and household members that come up on the search page.

If client is not found in the database ask them if they have a spouse or significant other that might be in our system.

Always put in the **update date**

Always put **your name** as the last person who updated the file.

**Make sure you verify all household information with client.**

**Verify Household members**, if one has left the home, make sure to check the gone box and put the gone date on that members file at the bottom of the household member's form.

Verify Income.

When entering services, **make sure enter the correct county code.** For example: If the client lives in the city of Hollister, you would select IMC Twin Falls as the county the service was done in.

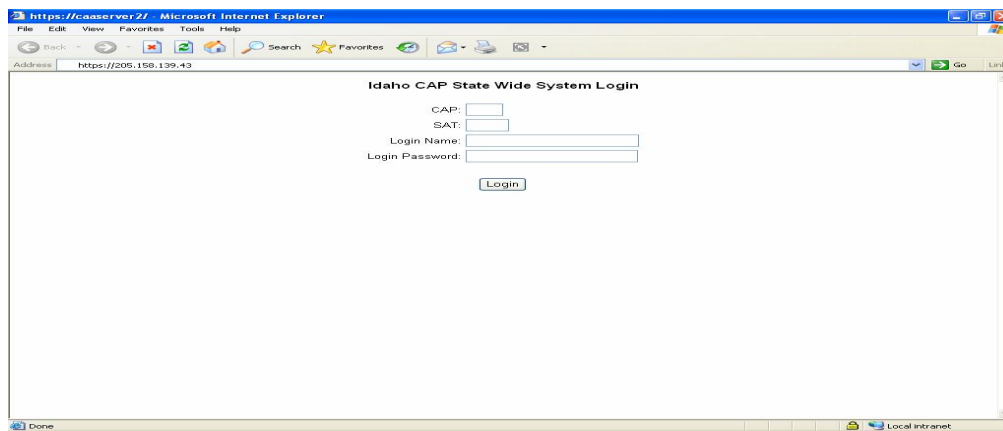
If the household is homeless you must check the use the drop down arrow for Living Arrangements on the Income Form. **Make sure to select the correct homeless status.**

**Always Save each page** as you are going!

You must enter a lot of required fields so please bear with the system. You must also **LOG OUT** when done...

### State Wide Database Home page Login Screen

The web page address for the State Wide Database (Amulet) is <https://205.158.139.43> This will take you to our server and the database. You must type in CAP, SAT, Username and password. Please keep in mind that these all relate to each of your sites.

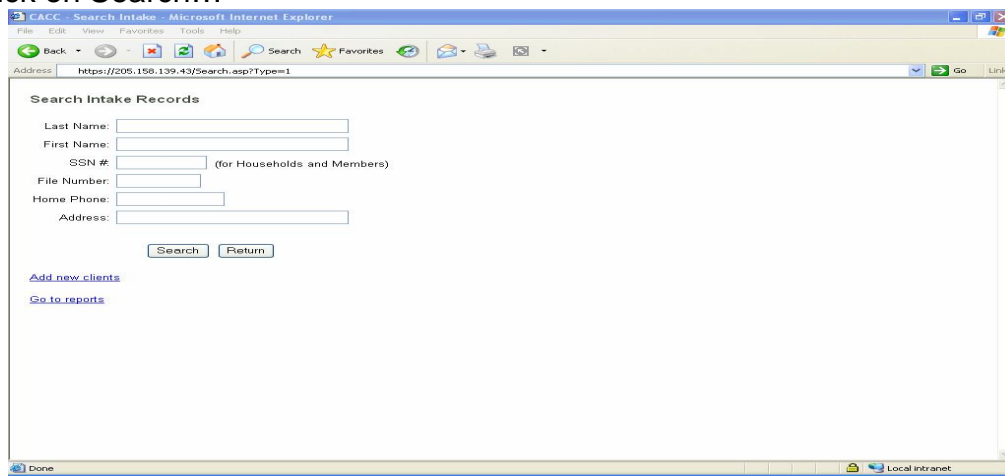
A screenshot of a Microsoft Internet Explorer browser window. The address bar shows 'https://caaserver2/'. The page title is 'Idaho CAP State Wide System Login'. The login form contains four input fields: 'CAP:', 'SAT:', 'Login Name:', and 'Login Password:'. Below these fields is a 'Login' button. The browser's status bar at the bottom indicates 'Done' and 'Local intranet'.

### Saving webpage to desktop

When you get to this window go to File, send to and select desktop as a shortcut. This will help in the future to access the database, as all you will need to do is double click on the shortcut to get to the database. Please rename the shortcut after putting it on your desktop. In order to rename it, you must go to the desktop icon and left click once to select the icon, then right click in the middle of the icon, go down to Rename, then change the name to ID Database.

## Database Search

The search menu is the next page to come up. If you know the SSN enter it without any dashes or slashes this will search the household files and also the household members in all households. Click on Search. If you do not know the SSN, enter last name or any other field and then click on Search...



Search Intake Records

Last Name:

First Name:

SSN #  (for Households and Members)

File Number:

Home Phone:

Address:

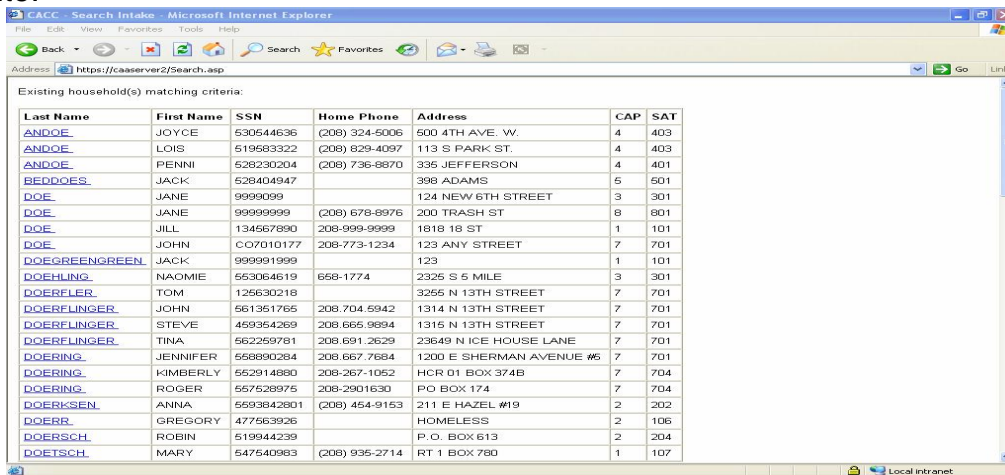
[Add new clients](#)

[Go to reports](#)

## Searching Intake Records

### Search by last name

The system will bring up the below window with everyone that matches. If there is more than one page of clients that match your search, you may use the bar on the right side of the page and this will take you down and up... just drag it. If you have a scroll mouse, you can also use that to scroll down the page. Remember this is the internet so it will work the same as any other website.



Existing household(s) matching criteria:

Last Name	First Name	SSN	Home Phone	Address	CAP	SAT
<a href="#">ANDOE</a>	JOYCE	530544636	(208) 324-5006	500 4TH AVE. W.	4	403
<a href="#">ANDOE</a>	LOIS	519583322	(208) 829-4097	113 S PARK ST.	4	403
<a href="#">ANDOE</a>	PENNI	526230204	(208) 736-8870	336 JEFFERSON	4	401
<a href="#">BEDDOES</a>	JACK	526404947		398 ADAMS	5	501
<a href="#">DOE</a>	JANE	99999999		124 NEW 6TH STREET	3	301
<a href="#">DOE</a>	JANE	99999999	(208) 678-8976	200 TRASH ST	8	801
<a href="#">DOE</a>	JILL	134567890	208-999-9999	1818 18 ST	1	101
<a href="#">DOE</a>	JOHN	CO7010177	208-773-1234	123 ANY STREET	7	701
<a href="#">DOEGREENGREEN</a>	JACK	999991999		123	1	101
<a href="#">DOELUNG</a>	NAOMIE	553064619	658-1774	2325 S 5 MILE	3	301
<a href="#">DOERFLER</a>	TOM	125630218		3255 N 13TH STREET	7	701
<a href="#">DOERFLINGER</a>	JOHN	561351765	208.704.5942	1314 N 13TH STREET	7	701
<a href="#">DOERFLINGER</a>	STEVE	459354269	208.665.9894	1315 N 13TH STREET	7	701
<a href="#">DOERFLINGER</a>	TINA	562259781	208.691.2629	23649 N ICE HOUSE LANE	7	701
<a href="#">DOERING</a>	JENNIFER	568890284	208.667.7684	1200 E SHERMAN AVENUE #5	7	701
<a href="#">DOERING</a>	KIMBERLY	552914890	208-267-1052	HCR 01 BOX 374B	7	704
<a href="#">DOERING</a>	ROGER	557528975	208-2901630	PO BOX 174	7	704
<a href="#">DOERKSEN</a>	ANNA	5693842801	(208) 454-9153	211 E HAZEL #19	2	202
<a href="#">DOERR</a>	GREGORY	477563926		HOMELESS	2	106
<a href="#">DOERSCH</a>	ROBIN	519944239		P.O. BOX 613	2	204
<a href="#">DOETSCH</a>	MARY	547540983	(208) 935-2714	RT 1 BOX 780	1	107

This is the search screen for the last name of DOE.

Just click on the Blue Last name of the person you want to choose and it will bring up their file. If the client is not in the database, click on the arrow back key that will take you back to the search page. Go to the bottom of the page and click on new. You will then have a brand new file to start on. **You must enter the SSN, Last & First Name, then go to the bottom of the page and click on Save.** The reason we need you to do this right away is that the system will see all files that have been chosen as new for whoever has them open as one file until you have saved it. If you do not do this you could end up with clients from someone else that is

entering a new client also and they have not saved either. So it is **very important** to always save the forms as you go along, or you will have to continue to re-enter information.

## Search by Social Security Number

When you do a search of SSN, you should come up with a window that looks like this:

Last Name	First Name	SSN	Home Phone	Address	CAP	SAT
<a href="#">ANDOE</a>	JOYCE	530544636	(208) 324-5006	500 4TH AVE. W.	4	403
<a href="#">ANDOE</a>	LOIS	519583322	(208) 829-4097	113 S PARK ST.	4	403
<a href="#">ANDOE</a>	PENNI	528230204	(208) 736-8870	335 JEFFERSON	4	401
<a href="#">REDDOES</a>	JACK	528404947		398 ADAMS	5	501
<a href="#">DOE</a>	JANE	9999099		124 NEW 6TH STREET	3	301
<a href="#">DOE</a>	JANE	99999999	(208) 678-8976	200 TRASH ST	8	801
<a href="#">DOE</a>	JILL	134567890	208-999-9999	1818 18 ST	1	101
<a href="#">DOE</a>	JOHN	C.O7010177	208-773-1234	123 ANY STREET	7	701
<a href="#">DOEGREENGREEN</a>	JACK	999991999		123	1	101
<a href="#">DOEHUNG</a>	NAOMIE	553064619	658-1774	2325 S 5 MILE	3	301
<a href="#">DOERFLER</a>	TOM	125630218		3255 N 13TH STREET	7	701
<a href="#">DOERFLINGER</a>	JOHN	561351765	208.704.5942	1314 N 13TH STREET	7	701
<a href="#">DOERFLINGER</a>	STEVE	459354269	208.665.9894	1315 N 13TH STREET	7	701
<a href="#">DOERFLINGER</a>	TINA	562259781	208.691.2629	23649 N ICE HOUSE LANE	7	701
<a href="#">DOERING</a>	JENNIFER	558890284	208.667.7684	1200 E SHERMAN AVENUE #5	7	701
<a href="#">DOERING</a>	KIMBERLY	552914880	208-267-1052	HCR 01 BOX 374B	7	704
<a href="#">DOERING</a>	ROGER	557528975	208-2901630	PO BOX 174	7	704
<a href="#">DOERSEN</a>	ANNA	5593842801	(208) 454-9153	211 E HAZEL #19	2	202
<a href="#">DOERR</a>	GREGORY	477563926		HOMELESS	2	106
<a href="#">DOERSCH</a>	ROBIN	519844239		P.O. BOX 613	2	204
<a href="#">DOETSCH</a>	MARY	547540983	(208) 935-2714	RT 1 BOX 780	1	107

## Household Form

After selecting the correct client you want to enter, you would have clicked on the blue last name that you wanted; you should go right into the database. The below form is the Intake Form- Household.

NOTE: If there are dashes in the SSN, remove them from the household form and the household member's forms.

**Intake Form - Household** [Log out](#)

Social Security #:  ☐ File Closed Closed Date:

First Name:  M.I.:  CAP:

Last Name:  SAT:

**Household** [Household Members](#) [Income](#) [Energy Assistance](#) [Additional Info](#) [Services](#) [Case Notes](#) [Reports](#)

Application Date:  Effective Date:  Last Update:

Address:  Updated By:

City:  State:  Zip code:

Resident Address:

City:  State:  Zip code:

County Name:  Home Phone:  Other Phone:

Phone Provider:

Subscriber SSN:  Last Name:  First Name:

Tel. Installation:  Denied Reason:

Tel. Assistance:  Denied Reason:

Note:

☐ CSBG ☒ LIHEAP ☐ Fam DEV ☐ ITSAP ☐ TEFAP ☐ Prog 6

Each form will have its title at the top, and the SSN, First & Last Name; CAP & SAT should follow you through all forms so you know you are on the correct client's file just by double checking the top of each page.

When you look at the bottom of this page, please note that there are some programs checked. Please when time allows uncheck the programs that the clients are no longer in. Please note

that Prog. 6 is for future growth.

**If the client is new, please make sure to fill out all fields.** If the client was previously in another CAP and SAT, you should not change these to your CAP agency and SAT offices unless the client has moved since receiving services at another CAP agency and/or SAT office. You must then change the last updated field to reflect the date you are doing the change and the updated by field to your name. It also helps if you write in a case note to clarify any information changes.

Example: The client has someone in their household leave the household, you must check them gone and put the gone date. You should make case notes as to any special circumstances.

## ITSAP Information

Please make sure to input the Phone Provider, Home Phone # and Subscriber's Name. The reason we want the Subscriber's Name is that sometimes the phone is not in the client's name and this will help us to notify the Phone companies of the correct name. You should also put in a case note as to why the account is under someone else's name. The phone number should be input as follows: 208-999-9999.

The screenshot shows a web browser window titled "CACC - Intake Form - Microsoft Internet Explorer". The address bar shows "https://caaserver2/Household.asp?IntakeID=9342". The form is titled "Intake Form - Household" and has a "Log out" link. The form contains the following fields and options:

- Social Security #: 134567890
- First Name: JILL
- Last Name: DOE
- M.I.: L
- CAP: 1
- SAT: 101
- File Closed: ☐
- Closed Date:
- Application Date: 12/1/2004
- Effective Date: 4/27/2000
- Last Update: 8/12/2002
- Address: 1818 18 ST
- City: LEWISTON
- State: ID
- Zip code: 83501
- Resident Address: 1818 18 ST
- City: LEWISTON
- State: ID
- Zip code: 83501
- County Name: NEZ PERCE
- Home Phone: 208-999-9999
- Other Phone:
- Phone Provider:
- Subscriber SSN: 123456789
- Last Name: doe
- First Name: john
- Tel. Installation: Denied
- Denied Reason:
- Tel. Assistance: Denied
- Denied Reason:
- Note:
- CSBG: ☐
- LIHEAP: ☒
- Fam DEV: ☐
- ITSAP: ☐
- TEFAP: ☐
- Prog 6: ☐

At the bottom of the form are buttons: Search, First, Previous, Next, Last, New, Save.

## Household Members

The applicant should be entered on the page. When entering the client's name please enter it the following way: Last Name then a space then the First Name and Middle Initial. Example: DOE JILL.

**IF THE CLIENT IS HOMELESS YOU MUST ENTER THIS OR OUR REPORTS WILL NOT BE ACCURATE.**

You may add new members here or remove them from the clients file.

To add, click on New and a blank form will pop up. You must enter all the information into the form. If you note above the DOB: Date of Birth is missing. Please make sure to enter the DOB in this format 01/01/1978. You must put the "/" in the DOB and dates. But not the SSN, leave them without the slashes.

Make sure to check all boxes that apply to each household member.

To remove a member of a household, please put the day before the today's current date in the Date Off box, then also put a check mark in the Gone box. This will allow you to put them in another household.



Please keep in mind that you should always do case notes if this does happen, so we can keep track of clients.  
Click on List if you wish to see everyone in the household.

Intake Form - Household Members

Social Security #: 134567890 CAP: 1  
Name: JILL L DOE SAT: 101

Household Members (Record 1 of 1)

SSN #: 134567890 Name: DOE, JILL  
Relationship: Applicant Sex: Female DOB: [blank]  
Race: White Citizen Status: US Citizen

☐ Disabled ☐ Veteran ☐ Food Stamp  
☐ SSI ☐ TAFI ☐ Social Security  
☐ No Income ☐ Pension ☐ Unemployment  
☐ Emp Plus Other ☐ Employment Only ☐ Other

Homeless: [blank] Farm Worker: N/A Employment: Unemployed  
Education: 0 - 8 Grade Health Insurance: No insurance  
Date On: 4/27/2000 Date Off: [blank] Gone: ☐

Search First Previous Next Last New Save Delete List Return

## Income

You must put the actual 3 month TGI (Total Gross Income) in the correct fields. You will then need to verify Family Type & living arrangements. The system will automatically drop the cents for the TGI, calculate Number in HH & EA HH, Check program eligibility for the programs and put yes/no depending on eligibility, and put in the 3 month TGI in that box.

If the household is homeless you must check the use the drop down arrow for Living Arrangements. Make sure to select the correct homeless status.  
You must click on **Check Eligibility** and it will calculate all of the above items.

Intake Form - Income

Social Security #: 134567890 CAP: 1  
Name: JILL L DOE SAT: 101

Household Household Members Income Energy Assistance Additional Info Services Case Notes Reports

	Applicant	Other	Total Income
Adjusted Gross Income:	445.89	0	445.89
TAFI:	0	0	0
SS/AABD:	0	0	0
Social Security	0	0	0
Self Employment:	0	0	0
Disability Benefits:	0	0	0
Unemployment Comp:	0	0	0
Child Support:	0	0	0
Interest Income:	0	0	0
Other (List):	0	0	0
Total Gross Income:	445	0	445
Income Verified:	<input checked="" type="checkbox"/>		

3 Month TGI: 445  
☐ Zero Income

Number in HH: 1  
Number in EA HH: 1

Meets CSBG Guidelines: Yes  
Meets TEFAP / ITSAP Guidelines: Yes  
Meets LIHEAP Guidelines: Yes

☐ Referral  
Referral Resource: [blank]

Family Type: Single Person  
Living Arrangement: Rent/Lease

Notes: [text area]

The following shows a client who has been checked for eligibility... Please note the Yes next to the programs.



**CACC - Intake Form - Income**

Log out

Social Security #: 134567890 CAP: 1  
Name: JILL L. DOE SAT: 105

Household Household Members **Income** Energy Assistance Additional Info Services  
Case Notes Reports

	Applicant	Spouse	Total Income	3 Month TGI
Adjusted Gross Income:	\$445.89	0	\$445.89	\$445
TAFI:	0	0	0	Zero Income
SSI/AABD:	0	0	0	Number in HH: 1
Social Security:	0	0	0	Number in EA HH: 1
Self Employment:	0	0	0	Meets CSBG Guidelines: Yes
Disability Benefits:	0	0	0	Meets TEAP Guidelines: Yes
Unemployment Comp:	0	0	0	Meets LIHEAP Guidelines: Yes
Child Support:	0	0	0	
Interest Income:	0	0	0	
Other (List):	0	0	0	
Total Gross Income:	\$445	0	\$445	
Income Verified:	0			
Verified By:				

Notes:

Family Type: Single Person  
Living Arrangement: Rent/Lease

Save Check Eligibility

## Energy Assistance

Please note there are lots of required fields on this page.

If the client rents, put in the rent amount.

Primary heat is labeled according to the way ID H & W have the Matrix heat costs set up. For example the client below uses AVISTA for electricity but H & W consider that the Northern Utility group, so we choose that. Then under Secondary Heat they use wood, so that is selected. The Fuel Supplier is the company's name that provides the Primary heat source. In this case AVISTA.

You **must** enter the account number for the Primary heat source. You will **not** need to do this if it is a direct payment to the client for wood or heat-in-rent.

You must also put in the age of the residence.

Then look to the right side of the page and check all boxes that apply.

**CACC - Intake Form - Energy Assistance**

Log out

Social Security #: 134567890 CAP: 1  
Name: JILL L. DOE SAT: 105

Household Household Members **Income** **Energy Assistance** Additional Info Services  
Case Notes Reports

Rent Amount: \$225

Housing Type: Multi (4+)

Primary Heat: Northern Utility (NU)

Secondary Heat: Wood/Pallets (WD)

Fuel Supplier: AVISTA - ELECTRIC

Account Number: 1234

Consumption Cost: 1058

Housing Age: 20

Meet LIHEAP Guideline: Yes

Target Group: No

Benefit Denial Code: 5 -Refused participation in Energy Education

Notes:

Save changes Calculate benefit

## Additional Information

You must enter the Landlords information if the client rents.

If they have zero income, this is where you will need to type in how they have paid for their Shelter, Food and Utilities for the last 3 months since they are claiming zero income.

You must also make sure they sign the Zero Income Declaration that is printed on the Assessment Declaration before the application for Energy Assistance can be

processed.

CACC - Intake Form - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://205.158.139.43/AdditionalInfo.asp

Intake Form - Additional Info [Log out](#)

Social Security #: 134567890 CAP: 1  
Name: JILL L. DOE SAT: 105

[Household](#) [Household Members](#) [Income](#) [Energy Assistance](#) [Additional Info](#) [Services](#)  
[Case Notes](#) [Reports](#)

Landlord: Jane Doe Smith  
Address: 111 Main Street  
Telephone: 205-999-9999

**ZERO INCOME DECLARATION:**  
I DECLARE THAT THE GROSS INCOME FOR MY HOUSHOLD HAS BEEN ZERO FOR THE PREVIOUS 3 MONTHS

Shelter:   
Food:   
Utilities:

## Services

This is where you will input all service provided codes accordingly.

To add a new code, just click on New, then a blank form will pop up. You will need to change the date if you are data entering on a date of service other than the current date. This would occur for staff that will be doing outreach or home visits. Sometimes it occurs just because and we understand that. However we want everyone to try doing all services in real time.

After entering a new service, you must click on save to save the service. If you wish to print this one slip, please click on Service Slip after saving. Then another form pops up that you may print from your web browser. Then you will need to use your Web browsers arrow back button to take you back to this page. Click on Return to go back to the Household form.

You may also want to make comments in the comments field, we use this for Food Boxes when they take them to the food bank we note FOOD BOX – 4, that would be for a family of four...

Also you can see below that it is noted who we spoke to and when....

CACC - Service Provided Form - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://205.158.139.43/Service.asp

Intake Form - Services [Log out](#)

Social Security #: 134567890 CAP: 1  
Name: JILL L. DOE SAT: 105

**Services Provided**

Service Date: 11/26/2003  
Service Code: 54 - LIHEAP  
County: NEZ PERCE (required for Cleaning House and Food Boxes)  
Amount: 517 Unit:   
Inkind: ☐ Program: LIHEAP  
Referral Type:   
Comment: Lisa w/AVISTA @ 10:30  
Verified: ☒ Verified By: kbriscoe

If you wish to print a list of services provided today, you may go to the Reports tab and select Service Delivered Report.

**CACC - Services Delivered Report** (as of 11/26/2003)

CAP	SAT	Application Date	
1	101	4/27/2000	
Last Name	First Name	Middle	Social Security #
DOE	JILL	L	134567890

Date	Code	Description	Amount	Comment
11/26/2003	3.6	ITSAP	\$0.00	
11/26/2003	7.3	Advocacy	\$0.00	
11/26/2003	5.4	LIHEAP	\$317.00	Lisa w/AVISTA @ 10:30

## Case Notes

It never hurts to document information. The more the better so that others can go back and look at what has been going on with our clients if you are not around to explain it to them.

You can also print just the one slip or all of them...

Click on return to return to the household form, after you have saved your note.

**CACC - Case Note Form** - Microsoft Internet Explorer

Intake Form - Case Notes [Log out](#)

Social Security #: 134567890 CAP: 1  
Name: JILL L DOE SAT: 101

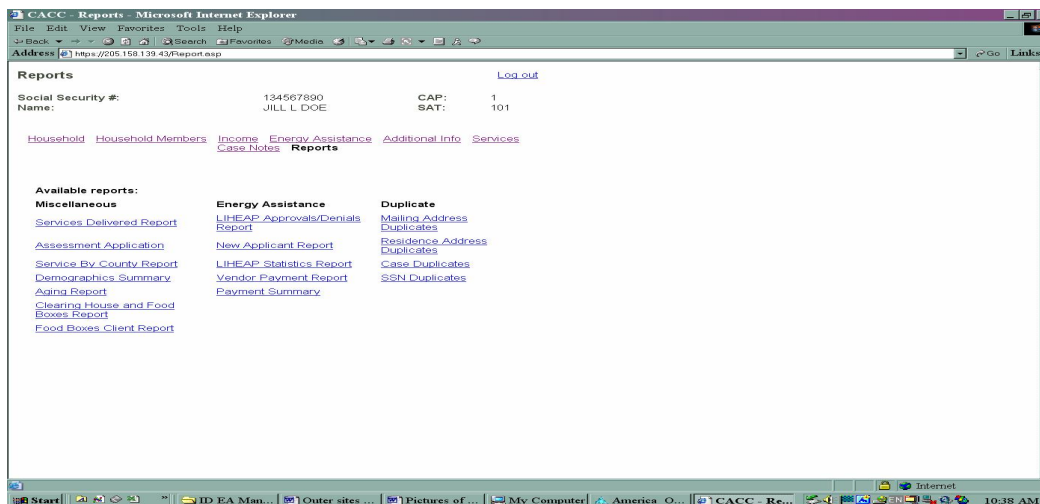
**Case Note**  
Date Entered: 11/26/2003  
Entered By: kbriscoe  
Note:  
If the case notes are for Family Development, please make sure to check the box below before saving the case note. This way no one but Family Development Specialists will be able to view these notes...

☒ Family Development staff only

First Previous Next Last New Save Delete List Print Print All Return

## Reports

To print the Assessment Application, which is our EA application, please click on Assessment Application under the first column of reports titled: Available reports:  
Miscellaneous



## Assessment Application

This will be a 4 to 5 page report depending on the size of the household.

If the name does not show up, and it was a new client, you must go and save the forms as they will not show up until they have been saved. This goes the same for any changes made if they were not saved, they will not print.

This report will not print automatically as it is in your Web browser, you must now tell your system to print by either going to the print button on your tool bar or to File, down to print on your tool bar, if you have more than one printer you print from, this is a good chose to do as you can then select the printer you want to use.

In order to get back to the reports page, you must use your arrow back button on the tool bar.

Weatherization Energy Assistance Block Grant Participant Assessment Application			
Social Security #	CAP	SAT	Application Date
134567890	1	101	4/27/2000
Last Name	First Name	Middle	
DOE	JILL	L	
Mailing Address			
1818 18 ST			
City	State	Zip Code	
LEWISTON	ID	83501	
Resident Address			
1818 18 ST			
City	State	Zip Code	
LEWISTON	ID	83501	
County	County Code	Home Phone	Other Phone
NEZ PERCE	5	208.995.9995	
Vendor Code	Fuel Supplier	Account Number	Consumption Cost
300	AVISTA - ELECTRIC	1234	\$1,050.00
Household Members			
Name: DOE, JILL			
Relationship	DOB	SSN	Race
Applicant		134567890	White
<input type="checkbox"/> Disabled	<input type="checkbox"/> Veteran	<input type="checkbox"/> Food Stamps	<input type="checkbox"/> Sup. Sec. Inc.
<input type="checkbox"/> Homeless	<input type="checkbox"/> Farmworker	<input type="checkbox"/> Employment	<input type="checkbox"/> Education
<input type="checkbox"/> Unemployed	<input type="checkbox"/> Health Ins	<input type="checkbox"/> Social Security	<input type="checkbox"/> No Insurance
Income Declaration			
Social Security #	First Name	Last Name	Family Type

Now you can log out or do another search. See the bottom of the form for another search.

If entering a new client just click on the New button at the bottom of the page. Prior to selecting new client, always look up and verify if the client is in the system or not. Since this is a state wide database there is a chance that they might have been into one of the other offices.

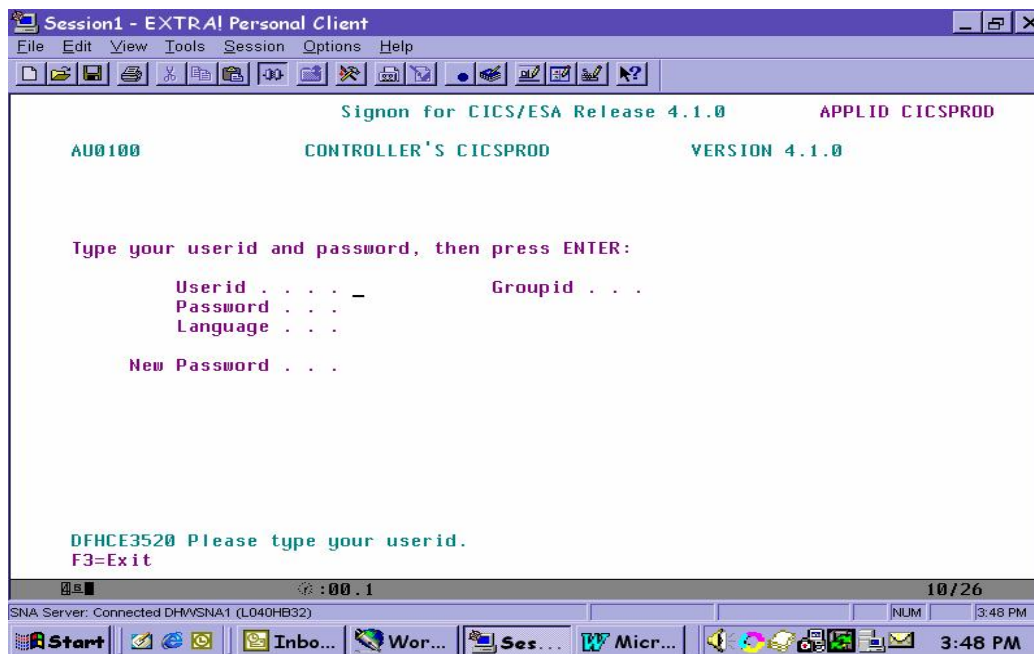
If you have any questions, please contact Kim Briscoe via email at [k.briscoe@acomunityactionpartnership.org](mailto:k.briscoe@acomunityactionpartnership.org), via phone at 208-746-3351 ext 201, or via cell phone at 208-790-0995.

[illegible]

Press the **PAUSE/BREAK** key.  
Type in CESN and press **ENTER**.



This is the Sign-on screen:

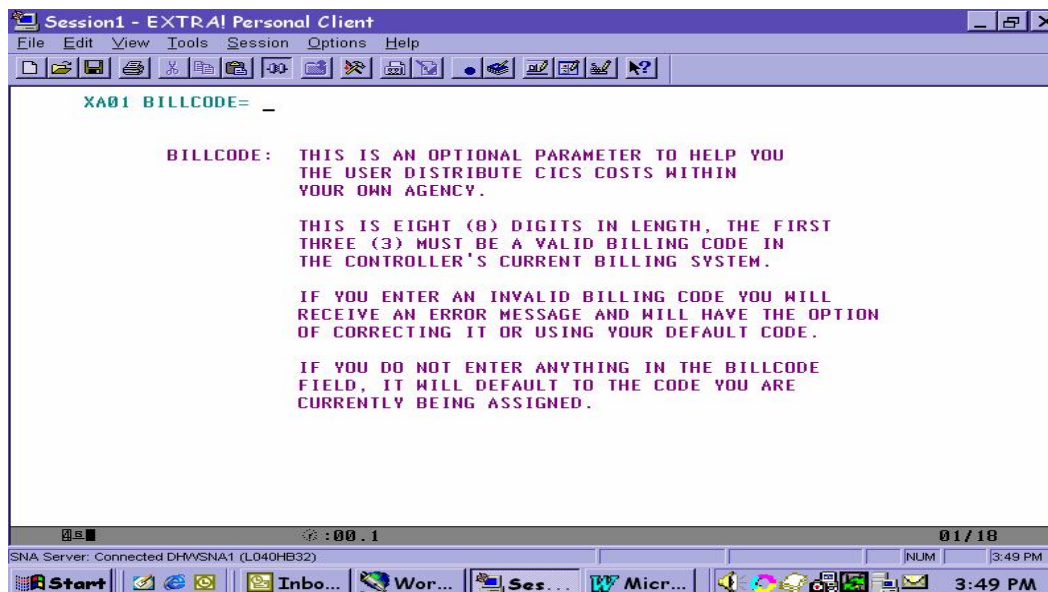


Enter your "HWxxxx" number in the Userid field and press the tab key twice or **CONTROL** key once.

Enter your password. This can be any combination of numbers and letters up to 8 characters. Press **ENTER**.

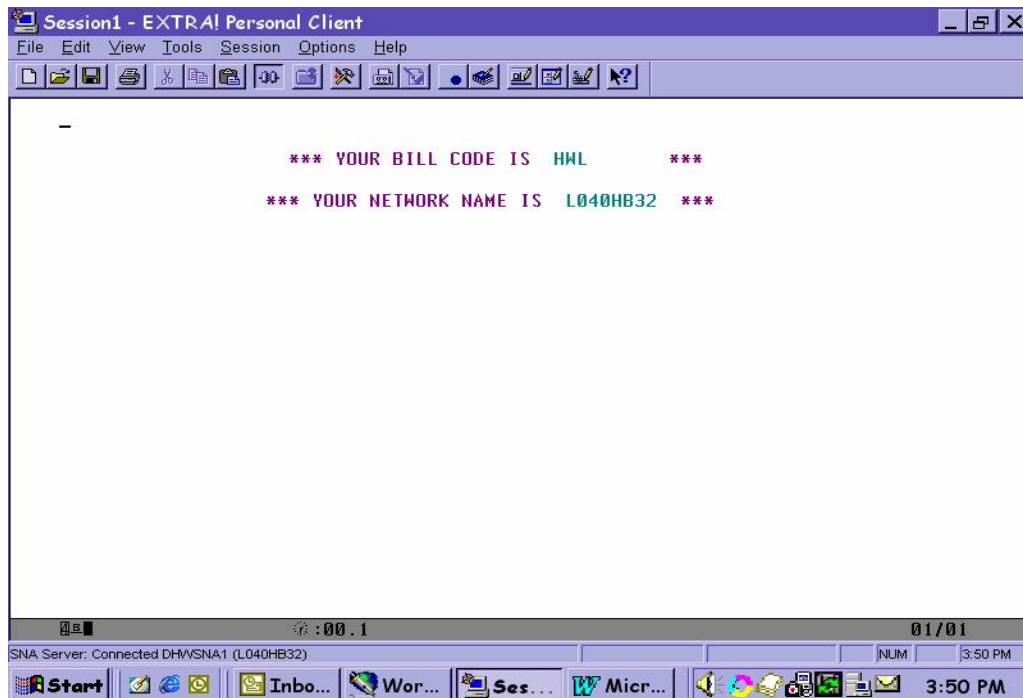
**If you are changing your password** enter the NEW password in the New Password field and press **ENTER**. The system will ask you to re-enter the new password for verification. Re-enter the new password and press **ENTER**.

This is the Billcode screen:



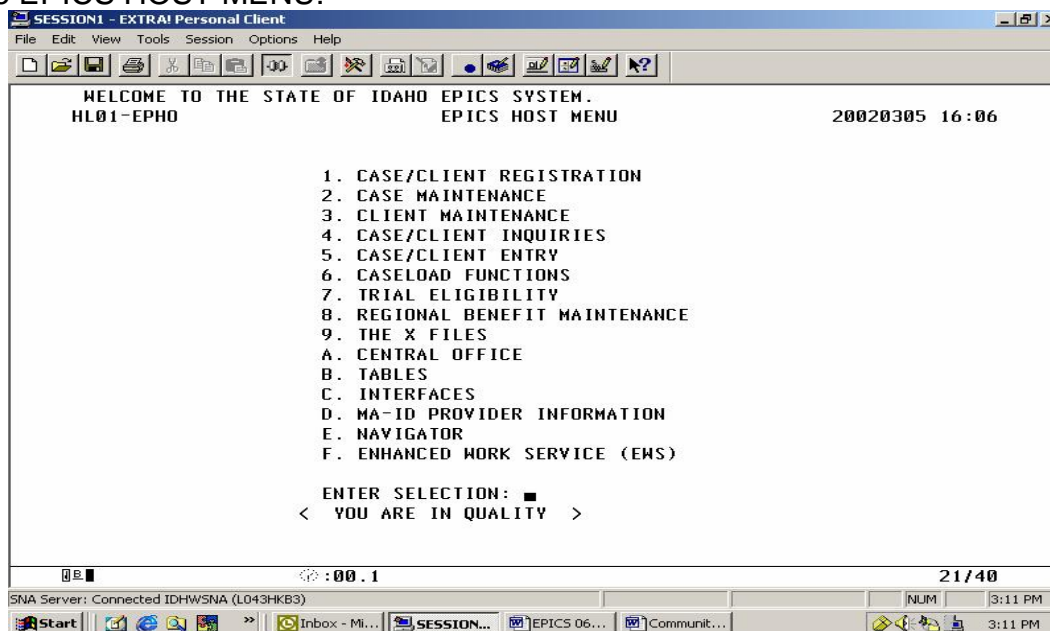
Press the **PAUSE/BREAK** key.

This is your Bill Code and Network Name screen:



Press the PAUSE/BREAK key.  
Type "HL01" and press the ENTER key.

This is the EPICS HOST MENU:



Enter a selection number or letter in the field above and press **ENTER**.

Here is a brief description of what you can access in each selection:

1. Register a new application (TAFI registration for RT1 or RT4)
2. Inquire on a participant, correct an application registration, maintain program, revert a program to 'open' or 'pending', delete a registered application or transfer a case from one worker to another within the same field office
3. Inquire on a participant and maintain their personal information
4. Case inquiry, benefits issuance inquiry, participant individual participation inquiry, budget spill inquiry and overpayment inquiry
5. Case/client maintenance
6. Regional online transaction history, electronic alert listing and electronic notice listing
- C. Interfaces – Vital Statistics, Child Care System, Energy Assistance, Dept. of Employment
- E. Navigator- Search by last name, first name; social security number, or client ID.
- F. Enhanced Work Service (EWS): Automated system to consolidate data input into one group of screens that will allow for standardization of input for EWS. The system allows for on-line referrals to a contractor for EWS under different categories of referrals for funding and services provided by the contractor.

SESSION1 - EXTRA Personal Client

File Edit View Tools Session Options Help

HMLN101M Navigator - Client Inquiry Short List 20011218 09:09:39

Seq	Last Name	First Name	I Sex	Birth	SSN	Client	Type
1	SCHWEIKERT	GEM	M	19990101	148574585	C059228	C
2	SCHWEIKERT	GEM	M	19990101	148574585	8049826	EI
3	*** End of Data ***						

To inquire on a specific client, enter his/her sequence number: 02

PF7-Back PF8-Forward PF9-NAVI

NUM 23/70 8:11 AM

Select the correct individual by typing the sequence number at the bottom of the page.

If the individual listed more than once, select the one that has a type "E" after the name.

SESSION1 - EXTRA Personal Client

File Edit View Tools Session Options Help

HMLN100M Navigator - Client Inquiry 20020305 16:11:49

Last Name: ZUVER First: C M. Initial: \_

For No Partial, Enter N: \_

SSN: 554 13 0160 DOB: 10 21 1967 or Age: \_ Sex: F

System	Name	Client	Case
EPICS/HOPR	ZUVER, CHRISTINE M	1096227	483523
ICSES	ZUVER, CHRISTINE M	1096227	
ICCP			
EWS	ZUVER, CHRISTINE M	1096227	
EPS			

PF1-HL01 PF2-EPICS PF3-EPS PF4-ICSES PF5-ICCP PF6-EWS PF10-Clear PF12-Exit

NUM 04/16 3:15 PM



After you have selected the correct individual, the navigator will display all systems the individual currently has or had participation in the past.

EPICS – Individual has participation in one or more of the following benefit programs:

AF – TAFI (Temporary Aid For Families in Idaho)

FS – Food Stamps

MA, PW, QC, MU, ME, & QP – Medicaid

SS – State Supplement Grant for elderly/disabled/blind

QM – pays for Medicare Premium

NH – Nursing Home assistance

FX – Foster Care

FC – Foster Care

AP – Absent parent

AR – Applicant/Recipient

ICSES – Idaho Child Support Enforcement System

The screenshot shows the 'Navigator - Client Inquiry' window in the EPICS system. The client's last name is 'ZUVER', first name is 'C', and middle initial is blank. The SSN is 554 13 0160, DOB is 10 21 1967, and sex is F. The window displays a table of systems with participation details:

System	Name	Client	Case
EPICS/WOPR	ZUVER, CHRISTINE M	1096227	483523
ICSES	ZUVER, CHRISTINE M	1096227	
ICCP			
EMS	ZUVER, CHRISTINE M	1096227	
EPS			

At the bottom, there are navigation buttons: PF1-HL01, PF2-EPICS, PF3-EPS, PF4-ICSES, PF5-ICCP, PF6-EMS, PF10-Clear, and PF12-Exit. The status bar shows 'SNA Server: Connected IDHWSNA (L043HKB3)' and the time is 3:15 PM.

F2 – EPICS will display all case participation for the selected individual.

AP – applying for themselves

NA – not applying

ST – Step parent

SS – SSI child

SA – SSI adult

BU – Budget unit only

DQ – Disqualified for quitting a job

EP – Essential person

IS – Ineligible spouse

Status: PA = pending application

DE = denied

OP = open

CL = closed (Past participation) you must enter the timeframe the household received benefits in the from and to fields.

NE – Not eligible

OU – moved from the household

PA – minor parent's parents

PS – postsecondary ineligible student

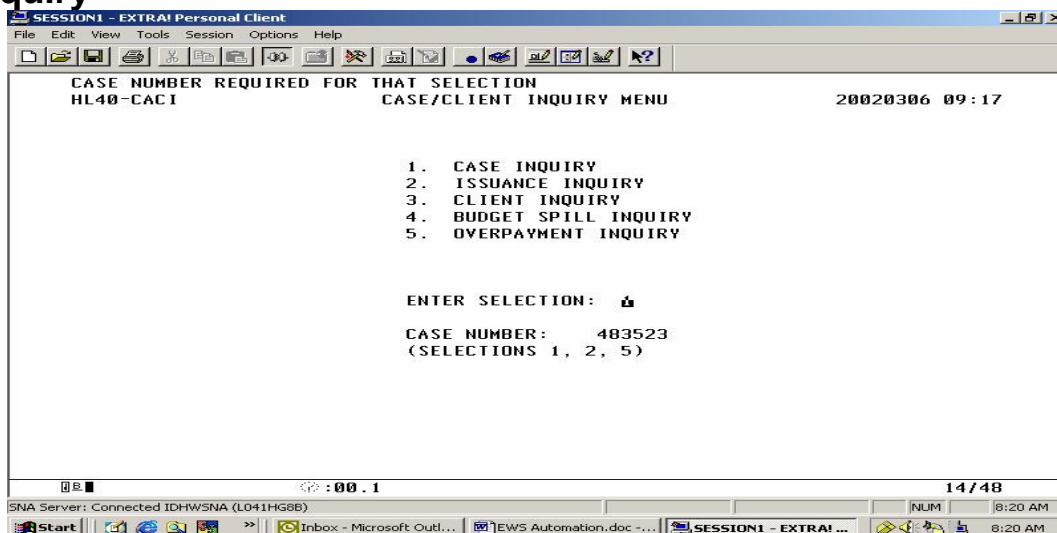
RM - retro medical

DF – Disqualified for Fraud

DS – Failure to provide SSN

IP – Incapacitated person

## Case Inquiry



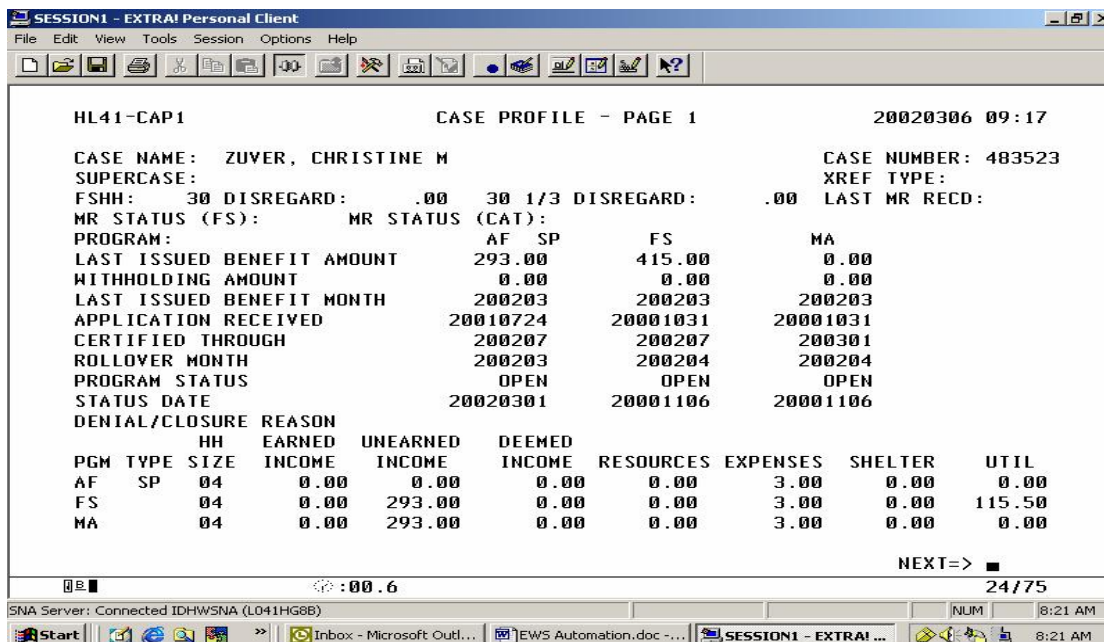
Case Inquiry selection 1 allows user to view three screens, which contain the most significant current information about a case.

Select #1 (Case Inquiry)

Enter the case number

Press the **ENTER** key

## CAP-1 Screen



The CAP-1 screen will display up to 4 program involvements. The screen displays case level information only.

Press the **ENTER** key to go to the next screen, which is CAP-2.

## CAP-2 Screen

SESSION1 - EXTRA! Personal Client

File Edit View Tools Session Options Help

HL45-CAP2 CASE PROFILE - PAGE 2 20020306 09:18

CASE NAME: ZUVER, CHRISTINE M CASE NUMBER: 483523  
SUPERCASE: X-REF TYPE:

----CLIENT----

IDENT	NAME	BIRTHDATE	SSN	PARTICIPATION				F O R P	WORK-PGMS		MONTHS USED			
				REL	AF	FS	MA		JOB	WRT	ABS	30	30	1/3
1096227	CHRIS M	19671021	554130160	MY	EL	EL	EL		MW	MW	00			
1096228	AMAND N	19880713	600968183	CH	EL	EL	EL		EC	EC	00			
1096229	SONNI C	19910121	600250142	CH	EL	EL	EL		EC	EC	00			
1096230	MOLLY M	19970611	535397226	CH	EL	EL	EL		EC	EC	00			

NEXT=> ■

24/75

SNA Server: Connected IDHWSNA (L041HG8B)

NUM 8:21 AM

Start Inbox - Microsoft Out... EWS Automation.doc... SESSION1 - EXTRA! ... 8:21 AM

The CAP-2 screen displays participant level information.

The screen contains client id numbers, partial first name, date of birth, social security numbers, relationship of the person to the my person of the case, participation codes for each program up to 4 programs, and the work participation codes.

Press the **ENTER** key to view CAP-3 screen.

## CAP-3 Screen

SESSION1 - EXTRA! Personal Client

File Edit View Tools Session Options Help

HL46-CAP3 CASE PROFILE - PAGE 3 20020306 09:18

CASE NAME: ZUVER, CHRISTINE M CASE NUMBER: 483523  
SUPERCASE: XREF TYPE:

FIELD OFFICE: 1309 CASELOAD: 71 WORKER NUMBER: 00202  
PHONE NUMBER: 208 255 2080 TELEPHONE TYPE: HOME

RESIDENCE: 709 N 3RD STREET SANDPOINT ID 83864

MAILING:

PAYEE:

PAYEE NAME:

AUTH REP NAME:

CERTIFIED MAIL (Y/N) N

NEXT=> ■

24/75

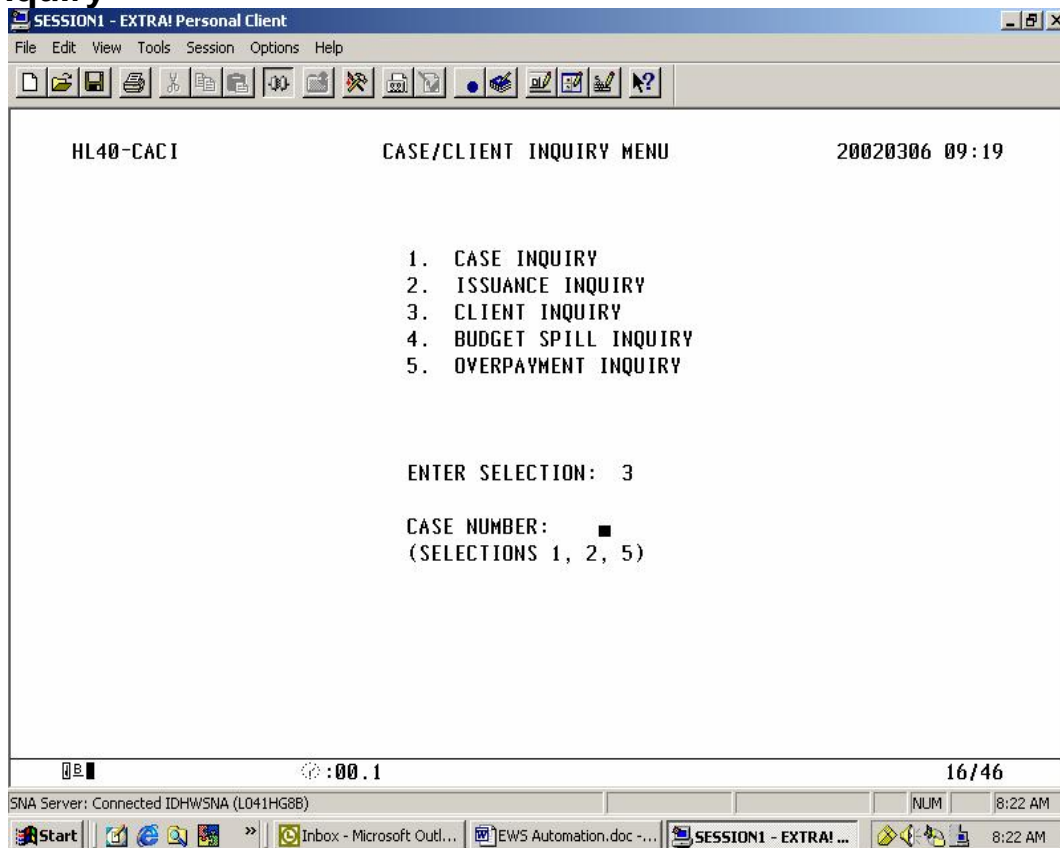
SNA Server: Connected IDHWSNA (L041HG8B)

NUM 8:22 AM

Start Inbox - Microsoft Out... EWS Automation.doc -... SESSION1 - EXTRA! ... 8:22 AM

The CAP-3 screen will list up to two different telephone numbers to contact the participant, current residence and mailing address of the participant. Press the **ENTER** key to return to the previous menu or **F9** twice to return to the Host Main Menu.

## Client Inquiry



The client inquiry allows users to locate an individual in EPICS/ICSES and inquire on the individual participations.

Enter selection #3

Press the **ENTER** key

User must have first and last name or the social security number for the individual or the system will not be able to complete a search. Participants with common last names may need to provide birth date or social security number to complete an accurate search. Enter the information and press the **ENTER** key.

## CLPR- Client Participation

SESSION1 - EXTRA! Personal Client

File Edit View Tools Session Options Help

END OF PROGRAM INVOLVEMENTS  
HL92-CLPR CLIENT PROFILE 20020306 09:20

CLIENT NAME: ZUYER, CHRISTINE M CLIENT IDENTIFIER: 1096227  
SSN OR SS5 DATE: 554130160  
IPV INDICATOR: N WK PENALTY #: 0 BIRTHDATE: 19671021  
SEX: FEMALE

SQ	CASE NO	PGM	PART	REL	EFFECTIVE-DATES	PROGRAM	DEN/CLS	WORK PROGRAMS
					START-----END	STATUS	REASON	O/P JOBS WT WR
01	483523	AF	EL	MY	20010724	OPEN		MM MM
02	483523	AF	NE	MY	20001031 20001031	DENIED	RC6	
03	483523	FS	EL	MY	20001031	OPEN		
04	483523	MA	EL	MY	20001001	OPEN		

TO INQUIRE ON PROGRAM INVOLVEMENT, ENTER ITS SEQUENCE NUMBER: ■  
NH=NUHD IPV=IPVI MED=MDCL TAFI COUNTER HISTORY=TIME IN NEXT :  
NEXT=>

PF1=PREV PF2=MAIN

21/67

SNA Server: Connected IDHWSNA (L041HG8B)

NUM 8:23 AM

Start | Inbox - Microsoft Out... | EWS Automation.doc -... | SESSION1 - EXTRA! ... | 8:23 AM

The system will display all participations for the individual.  
To inquire on a specific involvement enter the sequence number in the first available field on the screen. Press the **ENTER** key.



## PRIN- Program Involvement

SESSION1 - EXTRA! Personal Client

File Edit View Tools Session Options Help

END OF PERSON LIST  
HL93-PRIN PROGRAM INVOLVEMENT 20020306 09:21

CASE NAME: ZUVER, CHRISTINE M CASE NUMBER: 483523  
PROGRAM: TEMPORARY CASH FOR FAMILIES FIELD OFFICE: 1309  
START DATE: 20001031 PROGRAM STATUS: DENIED CASELOAD: 71  
END DATE: 20001031 CLOSURE REASON: WITHDREW APPLICATION

SQ	PART	EFFECTIVE DATES	CLIENT-NAME	SSN OR
NO	REL	CODE -START-----END-		BIRTHDATE SEX SS5 DATE
01	MY	NE 20001031 20001031	ZUVER, CHRISTINE M	19671021 F 554130160
02	CH	NE 20001031 20001031	FENNER, AMANDA N	19880713 F 600968183
03	CH	NE 20001031 20001031	FENNER, SONNIE C	19910121 F 600250142
04	CH	NE 20001031 20001031	FENNER, MOLLY M	19970611 F 535397226
05	PA	NA 20001031 20001031	ZUVER, CHARLENE Z	19490908 F 552827665

TO INQUIRE ON A CLIENT, ENTER HIS/HER SEQUENCE NUMBER: ■

PF1-PREV MENU PF2-MAIN MENU

NUM 8:25 AM

SNA Server: Connected IDHWSNA (L041HG8B)

Start Inbox - Microsoft Outl... EWS Automation.doc -... SESSION1 - EXTRA! ... 8:25 AM

The program involvement screen will give the status of the program and when the case is denied or closed the reason for the denial or closure will be displayed.

The program involvement screen also allows the user to select another participant to view program involvement or select the same individual to return to the client participation screen. This will allow the user to view the TAFI counter screen.

Press **ENTER** after selecting the correct participant.



## Client Profile

SESSION1 - EXTRA! Personal Client

File Edit View Tools Session Options Help

END OF PROGRAM INVOLVEMENTS  
HL92-CLPR CLIENT PROFILE 20020306 09:22

CLIENT NAME: ZUVER, CHRISTINE M CLIENT IDENTIFIER: 1096227  
SSN OR SS5 DATE: 554130160  
IPV INDICATOR: N WK PENALTY #: 0 BIRTHDATE: 19671021  
SEX: FEMALE

SQ	CASE	PGM	PART	REL	EFFECTIVE-DATES	PROGRAM	DEN/CLS	WORK	PROGRAMS		
NO	NUMBER				START-----END	STATUS	REASON	O/P	JOB	WT	HR
01	483523	AF	EL	MY	20010724	OPEN					
02	483523	AF	NE	MY	20001031 20001031	DENIED	RC6				
03	483523	FS	EL	MY	20001031	OPEN					
04	483523	MA	EL	MY	20001001	OPEN					

TO INQUIRE ON PROGRAM INVOLVEMENT, ENTER ITS SEQUENCE NUMBER: ■  
NH=NUHO IPV=IPVI MED=MDCL TAFI COUNTER HISTORY=TIME IN NEXT :  
NEXT=> timl  
PF1=PREV PF2=MAIN

21/67

SNA Server: Connected IDHWSNA (L041HG8B)

Start | Inbox - Microsoft Outl... | EWS Automation.doc -... | SESSION1 - EXTRA! ... | 8:26 AM

Press **F2** to return to the EPICS Host Menu.

SESSION1 - EXTRA! Personal Client

File Edit View Tools Session Options Help

WELCOME TO THE STATE OF IDAHO EPICS SYSTEM.  
HL01-EPHO EPICS HOST MENU 20020305 16:26

1. CASE/CLIENT REGISTRATION
2. CASE MAINTENANCE
3. CLIENT MAINTENANCE
4. CASE/CLIENT INQUIRIES
5. CASE/CLIENT ENTRY
6. CASELOAD FUNCTIONS
7. TRIAL ELIGIBILITY
8. REGIONAL BENEFIT MAINTENANCE
9. THE X FILES
- A. CENTRAL OFFICE
- B. TABLES
- C. INTERFACES
- D. MA-ID PROVIDER INFORMATION
- E. NAVIGATOR
- F. ENHANCED WORK SERVICE (EWS)

ENTER SELECTION: ■  
< YOU ARE IN QUALITY >

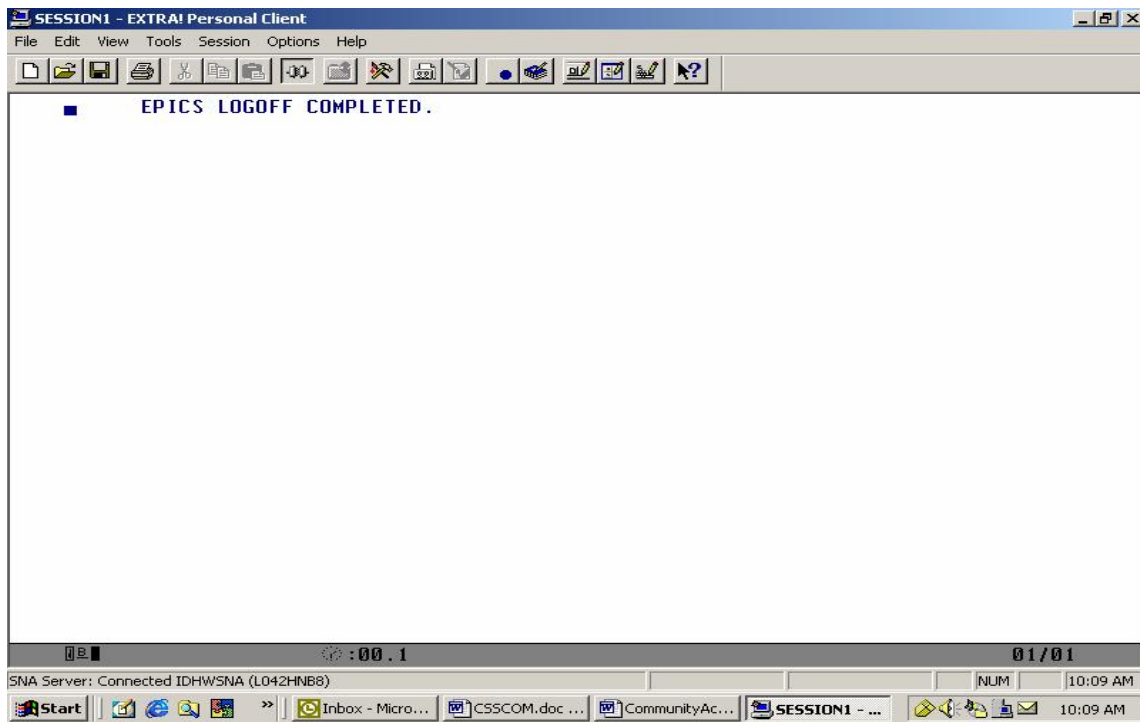
21/40

SNA Server: Connected IDHW/SNA (L043HKB3)

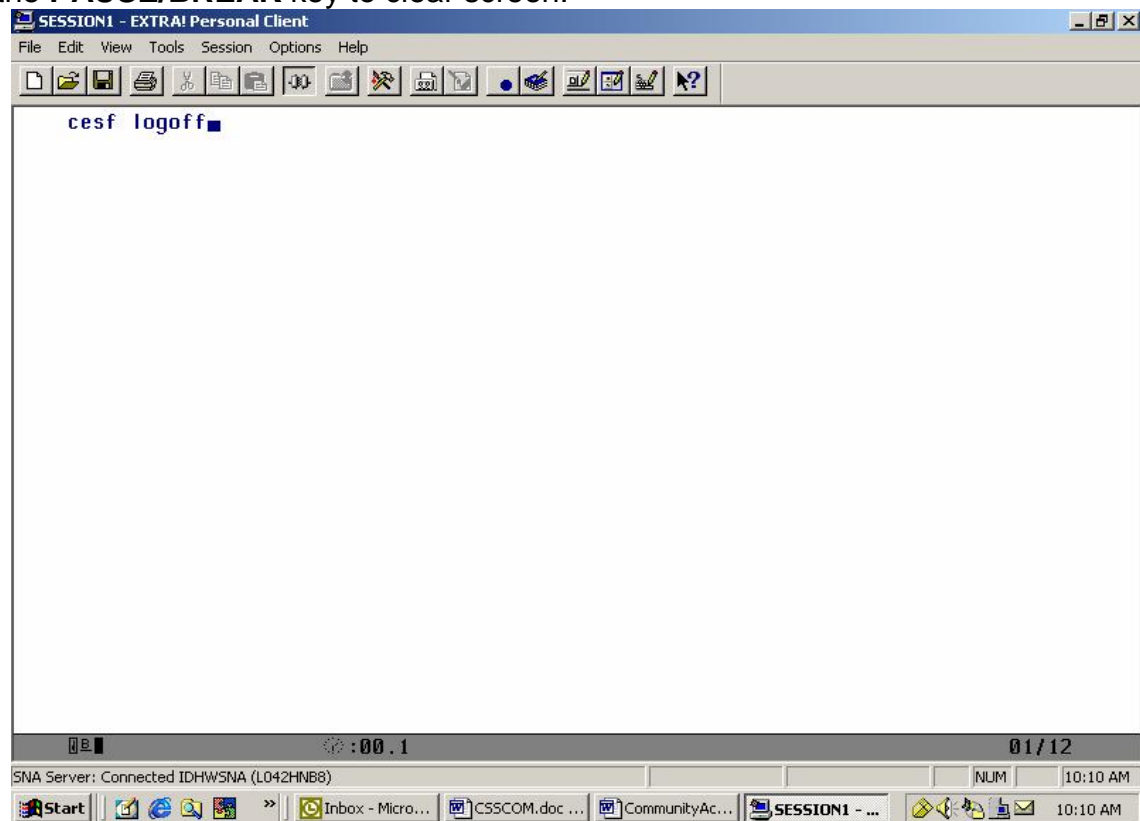
Start | Inbox - Micros... | SESSION1 - E... | EPICS 0601.do... | CommunityActi... | 3:32 PM

## System Log Off Procedure

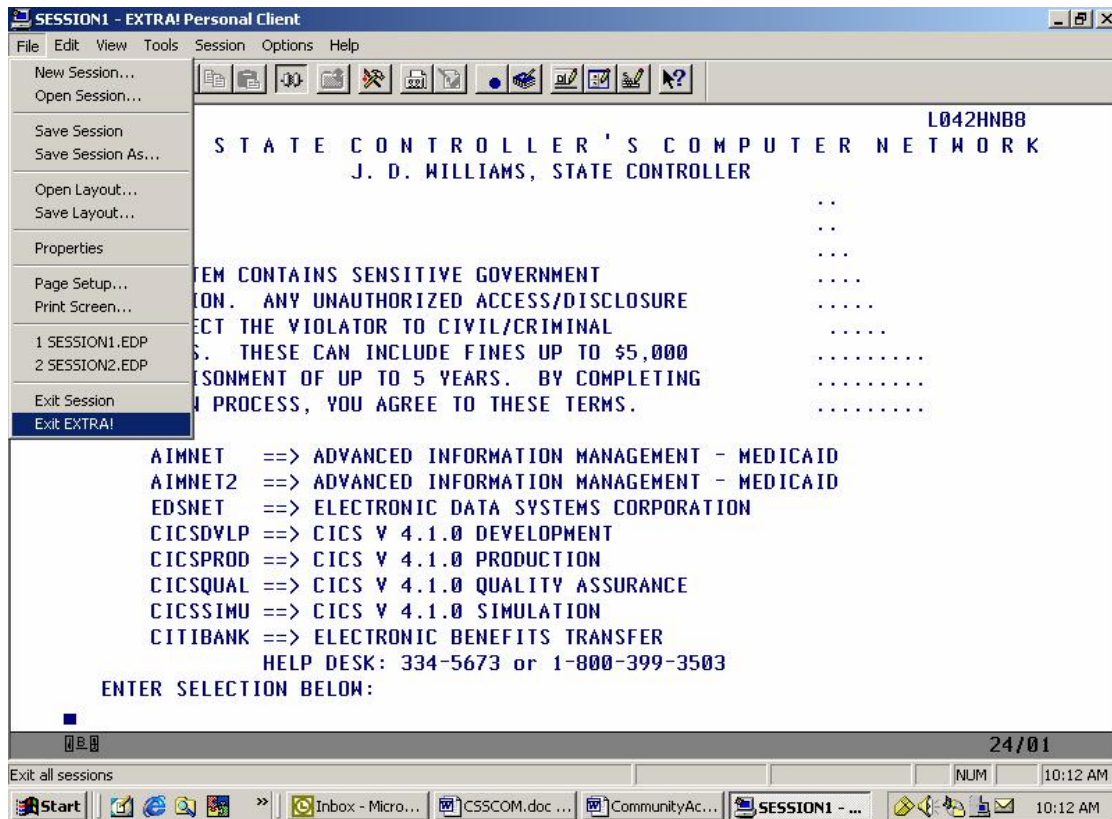
To log off the system from the Host Main Menu, press **F9**.



Press the **PAUSE/BREAK** key to clear screen.

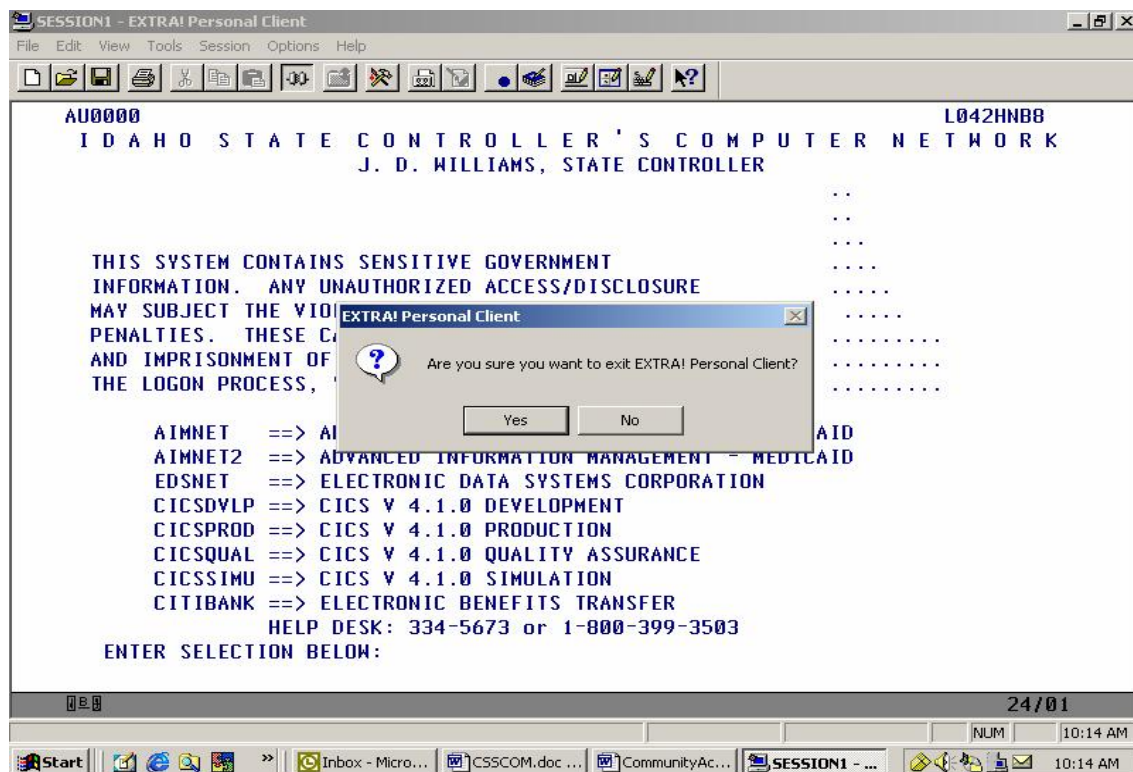


Type "cesf logoff" then press the **ENTER** key.



At the Idaho Screen

Select the "File" from the top left corner of the tool bar. Select "Exit EXTRA" from the drop down menu.



Select the yes button; you are now logged off properly from EPICS.